

# Market OUTLOOK

Week 47: November 18 - 24, 2024



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Market ALERT

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

## transportation

Nat'l Diesel Avg: \$3.521↓

Last Year: \$2.748↓

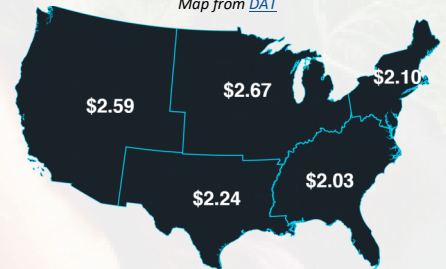
Nat'l Fuel Surcharge: \$0.42

Shortages: Freight rates is flat

- extreme - none
- slight - 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 sunny skies with highs in the 60s and lows in the 50s with showers on Saturday.

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

**Yuma, AZ:** Sunny and partly cloudy with highs in the 70s and lows in the upper 30s to 50s.

**Immokalee, FL:** Partly cloudy and rain with highs in the 80s and 70s and lows in the 60s to 40s.

**Idaho Falls, ID:** Cloudy and snow showers with highs in the 30s and 40s and lows in the 20s with showers on Saturday.



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# Market UPDATE

## apples



Washington's 2024 crop is expected to be of 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 increased, 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



**RADAR** Prices are slightly up. Peruvian supplies remain stable, but Mexico is expected to decrease for large and jumbo by the end of the month. Demand and prices are expected to rise in mid-November due to Mexico's transition and holiday season demand. White will remain limited until early December. Jumbos continues to escalate.

## avocados



Guatemalan have been approved to export to the US, but further steps are needed before they enter the market. Initial annual volume estimates are small, with Guatemala weighing 3.4 million lbs and Mexico weighing 2.8 billion lbs. Southern California experienced severe damage from the Mountain Fire and excessive Santa Ana winds, causing 20-30% crop losses. Short-term market conditions are expected, with the size curve expected to size up. Mexico's crop is about a month behind due to weather and increased dry matter requirements for importing into the US.

## bananas



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

## beans



**Green Beans:** Prices remain escalated. Lighter supplies are anticipated for the rest of November. Bushel prices are likely to remain escalated, and overall quality is good.

**Snow Peas:** Prices are up with high demands and limited supply during the Peru-Guatemala transition.

## berries



**Blackberries:** **RADAR** Prices are slightly up. 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:** **RADAR** Prices are steady. Mexico is of good quality with minor issues, and volumes are steady. Peru are of excellent quality and have steady volumes. Chile's organics are of exceptional quality but have light volumes.

**Raspberries:** **ALERT** Prices are up. In Mexico, the quality is excellent, with a vibrant red color, promising sizes, and steady volume. While in Watsonville, the quality is good, with a rich dark red color due to warm temperatures and an average medium size. However, production is quickly declining, with limited volumes as the season concludes in the next week or two.

**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 soon. Florida is delayed due to Hurricane Milton, while Mexico has begun, and quantities will increase weekly. The initial fruit quality is good, with some green tips and small to medium sizes.





# Market UPDATE

## broccoli



**Broccoli:** Supplies are extremely light. Demand has increased with Salinas crops decreasing. The transition to Yuma is expected to start soon for crowns. Mexico may provide some relief, and current pricing and contracts are escalated.

**Broccolini:** Prices are up with short supply, good demand, and fair quality. Limited supplies until the Yuma transition at the end of the month.

## brussels sprouts



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

## cabbages



Supplies are light. Growers are reporting field-level challenges and fair quality, with products coming from Oxnard and Salinas. Growers are facing quality issues due to insect damage and increased market prices, affecting light supplies until the transition to Yuma.

## 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 until the transition to Yuma is complete around November 20-24th, and market pricing will escalate for most contracts.

## celery



Supply is light coming from Santa Maria and Salinas. Quality is good, and market pricing is expected to increase due to limited supply and increased popularity during the holiday.

## citrus



**Limes:** The market remains low. Larger fruit sizes (150's, 175's, 110's) are in peak supply, while prices for small fruit are rising due to lower availability. Demand is increasing ahead of Thanksgiving, and costs are expected to rise, as current pricing is unsustainable for growers.

**Lemons:** Pricing is steady with District 3 packing good volume and good quality.

**Oranges:** Pricing is steady. California is packing decent volumes with smaller-sized fruit and with excellent quality.

## corn



Pricing is high, with limited availability on the east coast due to hurricane effects earlier this year. Supply in the west is light; market softened slightly due to lighter demand.

## cucumbers



Pricing is up. Volumes are limited, and quality is fair at best in the east, with Georgia's season winding down and south Florida's supply impacted by Hurricane Milton. Mexico, primarily from Baja, Sonora, and Central Mexico, is supplying moderate volumes. Strong demand is keeping markets firm. Volumes are expected to increase in December as Sinaloa crops begin.





# Market UPDATE

## grapes



The prices are slightly up. The California crop is declining in quality. Cold storage levels are sufficient, but red seedless movement is slow, leading to a projected shortage going into December. Green seedless is in high demand and readily available. Early shipments of Peruvian red are arriving as good options. Concerns about the inventory of green seedless lasting through Thanksgiving may drive up spot market prices.

## herbs



**Chervil:** Supply remains limited, but there has been a slight improvement.

**Cilantro:** Supply is improving with fair quality. Demand has increased, with supplies shipping from Oxnard and Salinas. Expected limited supply the next few weeks with improved market.

## 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:** Supply is light, with increased demand. Sizing is impacted by weather along with carton product weights. Quality is reported as fair as the Salinas season ends with an escalated market during the transition to Yuma.

**Iceberg:** Supply is limited and of fair quality, with increased demand. Sizing and weight are impacted. Huron is done as the transition to Yuma has started. Expect supplies to stabilize after Thanksgiving.

**Romaine:** Supply is severely short, with fair quality, leading to increased market prices. The Salinas season has ended, and quality issues may

arise due to heat waves. Expected improvement after transition to Yuma, with market price increases until transition is completed. Supplies are expected to stabilize after Thanksgiving.

**Tender Leaf:** Light supplies with fair quality and good demand. Market prices are up. Salinas is ending with transition to Yuma. Improved quality and supplies are expected after Thanksgiving.

## melons



**Cantaloupe:** **RADAR** Prices are slightly up. The Yuma program will end this week with limited availability on 9/12s and 15s. Guatemalan fruit is arriving in Florida, initially focusing on 9/12s but expected to reach larger fruit by early next week. The quality is excellent, clean, and solid, with a slight green cast and 11-15% brix levels.

**Honeydew:** **RADAR** Prices are slightly up. Limited 5/6 count is still available in Yuma, with offshore arrivals expected by late next week.

## mushrooms



Quality is good, but yields are fluctuating. Most growers continue to face supply issues. Availability will be affected by the holiday, and no price increases are expected. End users can be less affected by combining white and brown.

## onions



The quality of crops is good across all growing regions, with steady demand. Market prices remain steady, with the exception of red jumbos, which are slightly up. Overall volumes are up compared to last year. There's plenty of availability on all colors and sizes, except for medium reds, yellows, and whites. Mexico is buying a lot of white and reds.





# Market UPDATE

## onions green



Mexico supplies have improved, with increased demand and improved yields and market pricing.

## pears



**RADAR** The Northwest crop in WA/OR has decreased in volume due to weather in late February/March. Bartlett is 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 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. Canada's supply is tight on colored, especially on reds, with smaller sizing. The season is expected to end by late November, leaving Mexico as the main source. Central Mexico's production will remain light but steady until early December. Georgia's green bell is impacted by weather, and Florida faces quality issues due to Hurricane Milton. Light volumes will continue until new crops begin in December. In the west, Coachella, Oxnard, and Fresno have good quality, though strong demand is putting pressure on supplies. Sinaloa starts in December.

## peppers chili



Eastern supply remains limited, impacted by Hurricane Milton, with only light volumes from south Florida and Georgia. In the west, moderate supply is coming from Baja, Central Mexico, and Sonora.

## pineapples



The market is tight due to limited volumes, especially for larger sizes. Supply is improving, with a slow increase in larger-sized fruit. Flexibility with sizing, such as 8ct and 7ct, may be beneficial for optimal service levels. This slight but steady improvement in crop size should support demand through December.

## 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.

## squash



Pricing is steady. Good supply and quality from Georgia and Florida on yellow and zucchini. Sonora is supplying the west with good volume.

## tomatoes



Pricing is high. Eastern supplies are tight across varieties due to weather damage. Roma are limited in Quincy and Georgia, with Ruskin/Palmetto impacted by Hurricane Milton, resulting in mostly #2 and small fruit. Supply will improve in late December, when Florida starts. Out west, Baja and Mexico are supplying with low volumes and will not increase until Culiacán begins next month. Rounds are limited, with Quincy, Georgia, and Ruskin/Palmetto all facing reduced volumes. Florida will start slow, and Mexico's Baja and central/eastern regions are transitioning to fall crops. Grape is lighter than usual in Florida, with Palmetto/Ruskin severely affected by storms. Early south Florida is underperforming, while Baja is winding down, and new crops are delayed by cooler weather. Mexico is supplying light to moderate volumes with fair to good quality.





# Market UPDATE

## in the news...

### Despite rough hurricane season, Florida strawberry growers will "meet the demands of consumers this season"

November 14, 2024 | [FreshFruitPortal.com](https://FreshFruitPortal.com)

Florida strawberry growers have demonstrated resilience after enduring back-to-back hits from hurricanes Helene and Milton this year.

The University of Florida announced in a press release that through hard work and efficient problem-solving, growers have planted the strawberries that will be available from December through April.

Kenneth Parker, executive director of the Florida Strawberry Growers Association, works closely with University of Florida breeders, Extension agents, and growers to help address the needs of the Florida strawberry industry.

Growers are doing their best to ensure Florida strawberries are available for the holidays, the release said.

"As a general rule of thumb, Florida growers aim to complete planting each year around the first of November," Parker said. "For the most part, the industry has held to this standard through the hard work, dedication, and perseverance of both our growers and farmworkers."

Following the storms, some areas required extra effort to get the fields back in working order to complete planting. Growers had to wait for the water to recede before beginning their recovery efforts, Parker said.

"There is no way of accurately

predicting yield each season due to all the variables that determine this number," he said. "But we look forward to meeting the demands of consumers this growing season with the freshest, highest quality strawberries."

Additionally, the University noted that some growers are now planting two new UF/IFAS strawberry varieties that resist a disease plants can get from too much moisture in the soil.

UF/IFAS professor and strawberry breeder Vance Whitaker has developed Ember and Encore, bred to resist phytophthora root rot. The resistance could help strawberry yields, given the volume of rain that fell and the wet soil conditions, Whitaker said.

"Some plants experienced a lot of water. The flooding is most likely to kill a plant that's susceptible to root diseases," a faculty member at the UF/IFAS Gulf Coast Research and Education Center said. "So, these new varieties should help growers maintain their yield as well as provide a new level of fruit quality."

In their first year of commercial use, the two varieties account for about 10% of the 14,000 acres of strawberries in Florida. While that's not a huge percentage, Whitaker expects the acreage to increase in future years.



Vance Whitaker. Photo: UF

"We have a favorable weather outlook for the harvesting season," he said. "People should expect a typical Florida strawberry season."

It took about four years to develop these new cultivars and get them to commercial farms, which is typical for a new variety. But the time spent is well worth the effort, even if it's sometimes in inclement weather, Whitaker said.

"The breeding program had to get through the hurricanes and get our trials planted, ultimately for the benefit of the industry," he said. "We're all in this together. We support the growers, and they've been supportive of us."

Photos courtesy of the University of Florida

[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](mailto: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

