

Market OUTLOOK

Week 48: November 25 - December 1, 2024



Market ALERT

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

transportation

Nat'l Diesel Avg: \$3.491↓

Last Year: \$2.773↓

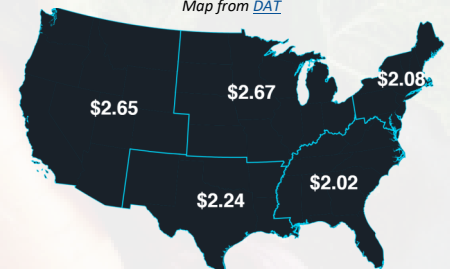
Nat'l Fuel Surcharge: \$0.41

Shortages: Freight rates is flat

- extreme - ID & WA
- slight - FL

National Posted Rate per mile

previous week's average outbound reefer rate for each region
Map from [DAT](#)



weather OUTLOOK

Oxnard, CA: Cloudy , showers, and fog with highs in the 60s and lows in the 50s with PM sun 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 50s.

Immokalee, FL: Sunny skies with highs in the 80s and lows in the 50s.

Idaho Falls, ID: Cloudy and sunny skies with highs in the 30s and lows in the 20s to mid-teens.



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 steady. Supplies are good, but prices have slightly increased due to increased demand. Baja is low, with northern Sonora starting in two to three weeks. Peruvian supplies remain steady, and market activity is slow but expected to rise with holiday demand. Guatemala may experience vessel delays due to rain and Tropical Storm Sara. Mexican production of larger sizes is expected to decrease by month-end. White asparagus supplies will remain limited until early December. Jumbos continue to escalate.

avocados



RADAR Some crops have had slight concerns about their quality over the past few weeks, and packing houses are working to resolve the issue. Mexico's projections suggest steady, stable volumes in the coming weeks, with off-shore fruit providing stability. The size curve continues to favor 60s and smaller, but rather than larger fruit falling in price to close the pricing gap between 48s and 60s, smaller fruit is increasing to catch up with the larger. The 'sizing-up' of the size curve remains a significant factor, with factors like late rainy seasons and higher dry matter requirements affecting the availability of larger fruit. It is recommended for storage at 42°F.

bananas



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

beans



Green Beans: Prices remain escalated with light supplies. Georgia is improving, while northern Florida will begin soon.

Snow Peas: Prices are steady. Guatemalan production is improving and expected to continue, while Peruvian production is out of season, and the markets are highly active.

berries



Blackberries: **RADAR** Prices are steady. Mexico has fair quality and improved volume, 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: Prices are steady. Mexico has increasing volume and quality ahead of its peak season from now to December. Peru is at peak harvest for the next two weeks, with weekly arrivals of mostly conventional fruit and some organic in December. Chile's quality remains high despite decreasing northern volume, with containers expected next week and steady availability starting in December. Peak volume for Chile is expected at the end of December.

Raspberries: **ALERT** Prices are steady. 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.



Market UPDATE

berries cont...



Strawberries: **ALERT** Prices are stable. 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 slowly starting with small and misshapen fruit but expected to improve, while Mexico has begun, and supplies will increase weekly. The initial fruit quality is good, with some green tips and small to medium sizes.

broccoli



Broccoli: Supplies are extremely light. Demand has decreased with Salinas crops declining quickly. The transition to Yuma will 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 has improved, with good demand and increased market pricing. 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 Yuma. Growers are facing quality issues due to insect damage and increased market prices. Supplies are expected to improve after Thanksgiving.

carrots



Supply is steady, with good quality and consistent sizing across the market. Cooler weather continues to support favorable growing conditions, but demand is expected to pick up closer for the holiday. It's a good time to secure orders early to ensure availability as demand tightens. Overall, the outlook remains positive, with no major disruptions anticipated.

cauliflower



Demand has decreased, with light supplies coming from Salinas and Santa Maria, with some from Mexico. Quality is fair and light supplies. Transition to Yuma is wrapping up, and market pricing will escalate.

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. District 3 is packing good volumes, and District 1 is about to start. Promotable volumes continue to be on 140s and smaller fruit. Quality is good.

Oranges: Pricing is steady. 88s and smaller fruit is readily available. Quality is good, and the fruit is eating well. Larger fruit is a bit more limited and is commanding a noticeably higher price.



Market UPDATE

corn



Pricing is trending down, and demand has softened, likely due to the high prices.

cucumbers



Market pricing remains steady, with quality ranging from fair to good. In Georgia, a few late fields are still producing but are winding down. Florida has lighter volumes due to the impact of earlier hurricane events. Mexico has adequate supplies, helping to balance overall availability.

grapes



Prices are up. California faces a shortage of green seedless fruit, with red being sufficient until mid-December. Importers on the east coast are sourcing fruit from Peru and Brazil. The industry is anticipated to transition to imported fruit by mid-December, with many growers expected to make the switch right after Thanksgiving.

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 Yuma. Expected limited supply the next few weeks with improved market.

Sage: Supplies are light due to rain and cool weather, with increased demand for Thanksgiving.

kale



Supply is steady with good demand and quality. Supplies and market prices are expected to be steady.

lettuce



Green & Red Leaf: Supply is light, with decreased demand. Sizing is impacted by weather along with carton product weights. Quality is reported as fair as with an escalated market from Yuma.

Iceberg: Supply is light and of fair quality, with lighter demand, causing the market to soften. Size and weight are impacted. Improved supplies are expected after Thanksgiving from Yuma.

Romaine: Supply is limited, with fair quality and light demand causing the market to soften. Size and weight are impacted, along with increased market price for the next few weeks. Supply will improve after Thanksgiving from Yuma.

Tender Leaf: Supply are light. Market prices are up, with a cooler morning causing slower growth in Yuma. Improved quality and supplies are expected after Thanksgiving.

melons



Cantaloupe: **RADAR** Prices are up. The shift towards 9/9Js is affecting smaller fruit pricing, while Guatemalan quality remains good. The transition to offshore and reduced production in Guatemala and Honduras are driving up prices.

Honeydew: **RADAR** Prices are up. Guatemala production is slowing down to avoid early rains, resulting in Mexico as the primary supply. Limited availability has increased prices. First Guatemalan shipments arrive at the end of the week, with larger sizes expected.

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.



Market UPDATE

onions



Quality is good, with steady demand. Market prices are down, except for whites, which are expected to continue to go up through January.

onions green



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

pears



RADAR The Northwest crop 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



Supplies are tight on colored bells as Canada wraps up its season, with central Mexico being the main source. Unfavorable weather has limited availability. Supplies are expected to remain constrained until mid-December, when mainland Mexico begins production. Green bells is facing shortages on both coasts. The east coast is limited as Georgia winds down and Florida is out of the market due to hurricane damage. Out west, Coachella is seeing lighter supplies, while Nogales is seeing limited crossings out of Sinaloa. Overall, supplies of both colored and green bells are expected to improve in December.

peppers chili



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

pineapples



Market is tight with limited volumes, especially for larger sizes. Supply is slowly improving on the larger-sized. Flexibility with sizing, such as 8ct and 7ct, may be beneficial for optimal service levels. Proactive planning is advised.

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 on the rise as demand outpaces supply. While supplies have remained steady in Georgia, Florida is seeing lighter availability as growers finish harvesting older fields. In the west, supplies are also down due to cooler temperatures. Additionally, unfavorable weather forecasts are expected to further tighten supply levels.

tomatoes



Pricing is high. Supplies are tight on the east coast, expected to last until Florida starts in mid-December. Early crops from Florida are expected to have lighter yields, and there are concerns about quality due to the impact of earlier hurricanes. Barring any further weather disruptions, Florida should return to normal supply levels by the beginning of the year. Out west, Baja California supplies are light as



Market UPDATE

tomatoes cont...



northern regions wind down, and production in central Mexico is feeling pressure from US demand and is challenged with cooler

temperatures reducing supplies. Significant volumes are not expected until January, when more areas come online.

in the news...

Thanksgiving dinner costs dip again, survey shows

Seven items for the holiday spread dropped in price this year, such as sweet potatoes and a vegetable tray of carrots and celery, according to the annual American Farm Bureau Federation Thanksgiving dinner survey.

THE PACKER STAFF • November 21, 2024 | thepacker.com

The cost of the Thanksgiving feast is down for the second year in a row, according to the 39th annual American Farm Bureau Federation Thanksgiving dinner survey.

The classic Thanksgiving spread for 10 will run shoppers \$58.08, down 5% from last year but still up 19% higher than five years ago. For one week each year, volunteer shoppers from all 50 states and Puerto Rico visit their local grocery store or a local store's website to survey the prices of items used in a typical Thanksgiving feast, according to a news release.

Since 1986, the volunteers have collected price data on turkey, cubed stuffing, sweet potatoes, dinner rolls, frozen peas, fresh cranberries, celery, carrots, pumpkin pie mix and crusts, whipping cream and whole milk.

Seven items dropped in price this year, including turkey, sweet potatoes, frozen peas, a vegetable tray of carrots and celery, pumpkin pie mix, pie crusts

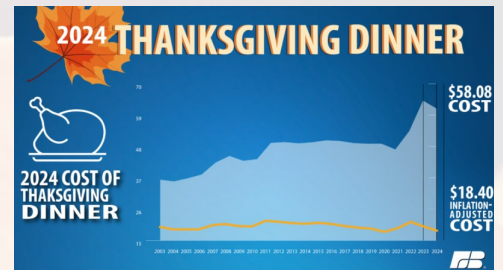
and whole milk, the release said. However, the remaining four items — dinner rolls, fresh cranberries, whipping cream and cubed stuffing — increased in price.

Prices for ham, russet potatoes and frozen green beans were added to the survey in 2018 to reflect more Thanksgiving favorites, with all of them showing a year-over-year reduction in price.

When including the additional items, the meal cost rose to \$77.34, or \$7.73 per person, with more leftovers, of course, according to the release. The updated Thanksgiving dinner nearly doubled the cost savings of the classic basket — an 8.7% decrease in price from 2023.

Overall price volatility in vegetables pulled fresh vegetable prices down, including those on the celery and carrot relish tray.

Fresh cranberries experienced an increase of 12% this year, however, the



A classic Thanksgiving spread for 10 will run shoppers \$58.08, down 5% from last year but still up 19% higher than five years ago, according to the 39th annual American Farm Bureau Federation Thanksgiving dinner survey. (Graphic courtesy of the American Farm Bureau Federation)

survey said the increase was a stabilization of prices after an 18% drop in prices from 2022 to 2023, the release said.

"Despite the year-over-year price increase, cranberries are still more affordable than historical averages," the report said. "In fact, when adjusted for inflation, this is the the lowest price for cranberries 1987."

For those celebrating in the West, the Thanksgiving grocery bill...

[Read full article HERE](#)

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