

Market OUTLOOK

Week 46: November 11 - 17, 2024



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Market ALERT

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

transportation

Nat'l Diesel Avg: \$3.536↓

Last Year: \$2.706↓

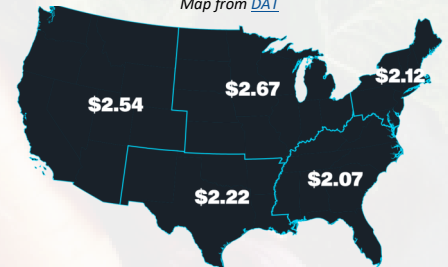
Nat'l Fuel Surcharge: \$0.42

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.

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 80s and lows in the 50s.

Immokalee, FL: Partly cloudy and showers with highs in the 80s and lows in the 70s and 60s.

Idaho Falls, ID: Partly cloudy and snow showers with highs in the 50s and 40s and lows in the 30s and 20s.



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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



Peruvian supplies remain stable, but Mexico is expected to decrease for large and jumbo sizes 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.

avocados



In the coming months, Mexico is expected to dominate the market, with Colombia, Chile, and the Dominican Republic also offering opportunities. Volumes will be good 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. Recommend storage temperature is 42°F.

bananas



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

beans



Green Beans: ALERT Prices remain escalated. Lighter supplies are anticipated for the rest of

November. Bushel prices are likely to rise, and overall quality is good.

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

berries



Blackberries: RADAR Prices are 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 Prices are down. Expect steady imports from Peru, Chile, and Mexico. Minor gaps may occur due to shipment timing. Peruvian and Chilean products are excellent, with good size and flavor. Volume increase expected next week. Mexico products are fair quality with issues like shriveling, red berries, and leaking packages.

Raspberries: RADAR Prices are 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. However, production is quickly declining, with the season concluding 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 is starting with small quantities expected to increase in 2-3 weeks. The initial fruit quality is good, with some green tips and small to medium sizes.



Market UPDATE

broccoli



Broccoli: Supplies are light. Demand has increased with Salinas crops rapidly depleting. The transition for crowns to Yuma is not expected until November 20th. Mexico may provide some relief, and current pricing and contracts are escalated.

Broccolini: Supply shortages with good demand and fair quality. Limited supplies will persist until the Yuma transition at the end of the month. Market pricing has reacted, causing limited supplies and increased prices.

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 increase 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 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 the holiday.

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 continues to increase packing. Weather is improving, which will help increase supply.

Oranges: Pricing is steady. California is packing decent volumes with smaller-sized fruit and with excellent quality. Supplies will continue to ramp up through 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 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 Scarlet Royal crop has strong quality and flavor but is expected to decline. 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 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 steady, with increased demand. Sizing is impacted by weather along with carton product weights. Quality is reported as fair as Salinas season ends, but supplies will improve with transition to Yuma.

Iceberg: **ALERT** The supply is light and of fair quality, with increased demand. Sizing and weight are impacted by the weather. Huron is ending with the transition to Yuma starting. Higher demand is causing market price increases.

Romaine: Market prices are up due to light

supplies, fair quality, and strong demand. Supplies are coming from Salinas and Santa Maria. Weather in Salinas is impacting quality but should improve once transition to Yuma. Market price increases are expected until the transition.

Tender Leaf: Light supplies with fair quality and good demand. Salinas is ending with transition to Yuma. Improved quality and supplies are expected and market prices are escalated.

melons



Cantaloupe: **RADAR** Prices have slightly up. Yuma has two weeks left, with Guatemalan arrivals in Florida next week. Initial arrivals will be minimal, allowing for a gradual transition of east coast customers by mid-November. Yuma is currently in the first cuts of the last fields, leading to improved sizing, which will decrease next week as the second cuts begin. Quality remains consistent, with greener melons experiencing some ground spotting. Internal quality is stable, with brix levels at 11-14%.

Honeydew: Prices are up. Yuma's production is high in 5/5Js, but smaller size is limited. Season ends mid-November; quality is good, but Guatemalan may be delayed due to early rains.

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 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



Market UPDATE

onions cont...



plenty of availability on all colors and sizes, except for medium reds, yellows, and whites. Mexico is buying a lot of whites and reds. With Hurricane Rafael potentially hitting Tampico, this could cause some shortages come January.

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 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. 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 supply is impacted by weather, and Florida's crop 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



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



Pricing is steady. Yellow and zucchini squashes are in good supply from Georgia and Florida, with strong quality. Growers in the east have replenished fields quickly after weather impacts, due to the crop's rapid growth cycle. 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 south Georgia, with Ruskin/Palmetto crops impacted by Hurricane Milton, resulting in mostly #2 and small fruit. Supply won't improve until late December, when south Florida's crops start. In the west, Baja and Central



Market UPDATE

tomatoes cont...



Mexico are supplying, but volumes are low, and significant increases won't come until Culiacán begins production in December. Rounds are similarly limited, with Quincy, south Georgia, and Ruskin/Palmetto all facing reduced volumes. Florida's crops will be slow to start, and Mexico's

Baja and Central/Eastern regions are transitioning to fall crops. Grape is also lighter than usual in Florida, with Palmetto/Ruskin severely affected by storms. Early south Florida crops are underperforming, and while Baja is winding down, new crops are delayed by cooler weather. Central Mexico is supplying light to moderate volumes with fair to good quality.

in the news...

Chilean grape supply expected up for 2024-25

The USDA estimates that Chilean table grape production, aided by high yields, will increase by 6.6%.

TOM KARST • November 05, 2024 | thepacker.com

Chilean grape production and exports are projected to increase in the 2024-25 marketing year, a new USDA report says.

The USDA estimates that Chilean table grape production, aided by high yields, will increase by 6.6%, totaling 723,000 metric tons. Chilean grape exports will increase by 7.8% and total 570,000 metric tons, according to the USDA.

One positive factor for export prospects is a newly approved pest mitigation procedure for shipments of some Chilean grapes to the U.S.

In July 2024, USDA published the final notice allowing Chilean table grapes for certain regions to be imported without methyl bromide fumigation.

"The new requirements will allow table grapes from areas of Chile where European grapevine moth is either absent or at a low prevalence and will also protect U.S. agriculture from Chilean false red mite," the report said. "These requirements reduce the use of methyl bromide and will also serve to increase the competitiveness of Chilean table grapes."

Favorable weather conditions, including abundant rainfall and ideal chill hours during the winter, will contribute to higher grape yields.

Area planted for Chilean grapes will decline by 2.3% to 96,371 acres, the report said. The area dedicated to table grapes has been declining for over a decade due to narrow profit margins, increased competition from other suppliers and low prices for traditional varieties like crimson, flame, and red globe.

"The northern Atacama region has seen a particularly sharp decline due to low prices and high production costs, including labor, transport, and chemical products," the report said. "Grapes from the Atacama region face intense competition from Peruvian grapes in the U.S. market, which drives their prices down."

The demand for new grape varieties further tightens profit margins, as renewing grape orchards requires a significant investment from producers, the report said. Table grape area planted in the Metropolitana region



Chilean grape exports are projected higher for 2024-25. (Photo: Kesinee, Adobe Stock)

decreased by 22.5% in the last three marketing years. The grape area planted in the O'Higgins region, which is the top-producing region in Chile, decreased by 5.2% in the last year. In these regions, table grape vineyards were replaced by more profitable crops such as walnuts, cherries and citrus or by the expansion of urban areas, the report said.

The top markets for Chilean table grape exports are...

[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

