

# Market **OUTLOOK**

Week 42: October 14 - 20, 2024



**Market ALERT**

Asparagus  
Beans  
Berries  
Broccoli  
Cabbage  
Citrus  
Grapes  
Green Onions  
Herbs  
Melons  
Mushrooms  
Pears

## transportation

Nat'l Diesel Avg: \$3.584↑

Last Year: \$2.67↓

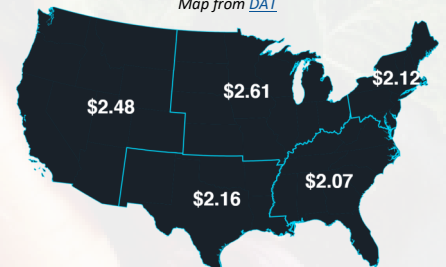
Nat'l Fuel Surcharge: \$0.46

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, foggy and sunny skies with highs in the 60s and lows in the 50s.

**Salinas, CA:** Partly cloudy with highs in the 70s and lows in the 50s.

**Yuma, AZ:** Sunny skies with highs in the 90s and lows in the 60s.

**Immokalee, FL:** Thunderstorms, showers, and partly cloudy with highs in the 80s and lows in the 60s to 70s.

**Idaho Falls, ID:** Cloudy and sunny skies with highs in the 70s to 50s and lows in the 40s to 20s with morning showers on Thursday.



# Market UPDATE

## apples



The 2024 crop in Washington is expected to be of outstanding quality due to favorable growing conditions. The forecasted crop is 124 million, down from 136 million in the previous year. However, red delicious, gold delicious, granny smith, gala, and fuji have all decreased. Cosmic has seen a significant increase, with 2.8 million boxes. As the state faces a 12 million box deficit from the 2023 season, prices are expected to rise. There is still ample fruit to ship year-round.

## asparagus



Peruvian volume is slowly increasing, with good quality and high demand. High temperatures in the Baja area cause concern. Pricing continues to escalate, mainly on the larger sizing.

## avocados



The supply chain is recovering from the rain market, but inventory in the US is declining. To maintain a stable market, volumes need to exceed 50 million lbs/week. However, projections for Mexico suggest an average of 56 million lbs/week, which could lead to a lower-priced market for late October through Q4. The biggest challenge will be managing the size curve, which is shifting with the harvest transition from Loca into Aventajada. Aventajada is producing smaller sizes than expected, but with consistent sunshine, the fruit will size up quickly.

## bananas



Quality is good, with consistent volumes. Hurricane-related weather in the southeast is expected. Due to Hurricane Milton, vessels will be sent to Port Freeport and Port Holt to move produce from those locations into the southeast. Strategic planning with local DC is advised.

## beans



**Green Beans:** Prices are escalated. Hurricane Helena caused minimal damage in Georgia and North Florida, while Hurricane Milton's impacts are uncertain. Central Florida experienced flooding, while South Florida experienced tornadoes, causing 400 acres of loss so far. The situation is expected to worsen until December.

**Snow Peas:** The prices are decreasing. Guatemala's volume is low, with fair quality and low demand, while Peru has good quality and low demand, with a reasonable volume.

## berries



**Blackberries:** **RADAR** Prices remain stable. In Mexico, quality is fair, with some soft fruit and pest pressure due to high humidity. Volumes have increased, resulting in steady volume until December. In Watsonville, the quality is good and the flavor is excellent. Production is slowing as it enters a low season with limited availability.

**Blueberries:** **ALERT** There is a significant supply gap between domestic and imported crops. The remaining volumes in the Pacific Northwest are minimal, as the season ended sooner than expected due to quality issues. This industry-wide shortage will last until Peruvian and Central Mexico imports begin to hit the US markets with significant volume. Current forecasts show a continued rapid decline, bottoming out in mid-late October before volume increases and finally re-aligning around mid-November. As a result, with minimal volume, shortages are expected for October with continually increasing and active markets.

**Raspberries:** **RADAR** Prices remain stable. In Mexico, the quality is fair and production is steady, while in Watsonville, the production has increased for the final time before the season ends.



# Market UPDATE

## berries cont...



**Strawberries:** Prices are stable, with fair quality from Salinas, Santa Maria, and Watsonville. Santa Maria's fall crop quality is good, with some bronzing. Volume is strong, peaking in the next few weeks. Watsonville/Salinas quality is good, with some dark fruit occurrences. Overall output volume is decreasing week over week.

## broccoli



**Broccoli:** Supply is light from Salinas and Santa Maria, with demand increasing. Mexico supplies are improving, but growers face quality issues. Fair quality is reported, and market pricing is active, expected to escalate for weeks.

**Broccolini:** Supply is short with good demand and fair quality. Limited supplies are expected in the coming weeks, along with 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



The supply is on budget and demand is increasing, with supplies coming from Salinas and Santa Maria, with some from Mexico. Quality is fair, and market pricing has improved. Supplies are light, and there will be an increase in market pricing in the coming weeks.

## celery



Supply is steady, with good quality from Santa Maria and Salinas. Expect market pricing and supplies to remain steady for the next few weeks.

## citrus



**Limes:** The market is declining, with small sizes priced to sell and mid/large sizes tapering. New crop harvests show improved coloring, but high humidity is causing skin breakdown. Small fruit accounts for over 60% of yields, while large sizes are limited. Overall pricing is expected to stabilize through October.

**Lemons:** District 3's harvest is ramping up; the fruit is high quality and of normal size. U.S. supply remains limited but improving; imports will help meet demand.

**Oranges:** **ALERT** Pricing is high. Most shippers are finished packing Valencia for the season. Domestic oranges are gapping until the domestic Navel crop starts in late October.

## corn



Pricing is trending upward, with limited availability on the east coast. The effects of damage from Hurricane Helene will continue to be felt in the coming weeks. Supply in the west is light, and markets are expected to remain firm and high.



# Market UPDATE

## cucumbers



Pricing is steady. North Carolina is producing a good volume to meet east coast demand, while Baja and Central Mexico are still supplying a strong volume for the west coast.

## 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 limited, 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. Market pricing will increase next week, and harvest is expected to start in Huron.

**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:** Steady supplies, with good to fair quality. Good demand from Salinas and Watsonville. Quality and supplies are expected to be steady.

## melons



**Cantaloupe: RADAR** Prices are slightly up. California production is starting to wind down next week, with Yuma starting with limited production. The sizing profile in Yuma will be similar, focusing on 9s and 12s, with few jumbos harvested. California's growing conditions have been excellent, with higher temperatures and dry weather contributing to optimal quality. Brix levels are mainly 12-14%.

**Honeydew: RADAR** Prices are stable. There is some external scarring, but it is excellent internally, mostly in the 5s and 6s with a few jumbos. Cleaner external fruit is expected after the desert move, with high Brix levels of 12-16%.

## 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 growing regions, with steady demand and market pricing. Overall volumes are up compared to last year.



# Market UPDATE

## onions green



Limited supplies, primarily from Mexico, with an increased demand. Growers are recovering from previous market conditions, and market pricing has reacted to these shortages, causing expected increased pricing in the coming weeks.

## pears



**RADAR** The Northwest pear crop in Washington/Oregon has experienced a significant decrease in volume due to below-average temperatures in late February/early March, affecting bud development in higher elevation areas. The Pacific Northwest has seen a 14% decrease in bartlett volume, affecting the grade and increasing the size profile. Anjous have experienced a 30% decrease, while Red Anjous are down 7%. Bosc is down 63%, with market pricing expected to escalate all season.

## peppers bell



Price is steady. Green bell production continues in North Carolina, while it remains limited in Georgia. The effects of Hurricane Helene will likely tighten this market in the coming weeks as Georgia growers experience its impact. Expect increased activity in this market soon. California is still producing a good volume, but Mexico is poised to take over in 5 to 10 days. Canada and Central Mexico are consistently producing red bells, helping to keep the market stable.

## peppers chili



Pricing is steady. Supplies from the west remain good, while Eastern supplies are lighter as several growers are winding down and damage from the hurricane is still being assessed.

## pineapples



The domestic market is active, with domestic demand pushing all-time highs out of Costa Rica. Supplies and availability improved in September, and yields and pack-outs are nearly back to normal. Volumes are expected to continue improving as the holiday season approaches, with demand increasing, especially in Europe. Quality is improving, with sizing favoring 6ct and 7ct, and brix at 13+.

## potatoes



The Idaho market pricing is down, with good quality. Yields are down by 2.7% 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. Production continues in North Carolina, while it remains limited in Georgia. The effects of Hurricane Helene will likely tighten this market in the coming weeks as Georgia growers experience its impact. Expect increased activity in this market soon.

## tomatoes



Grape pricing remains stable, with the eastern shore of VA producing a large portion to meet demand. SC is producing small quantities, while Baja and central Mexico supply significant volumes to the west coast. Roma and round prices are trending higher due to cooler weather slowing production on the eastern shore of VA. The transition to SC and GA/FL, with Hurricane Helene's effects expected. Baja and Los Banos continue to produce roma, while central Mexico provides decent to fair volume.



# Market UPDATE

## in the news...

### Hurricane Milton moves away from Florida as authorities assess damages

October 10, 2024 | [freshfruitportal.com](http://freshfruitportal.com)

Hurricane Milton has moved away from Florida's east coast after making landfall on Wednesday as a Category 3 storm, leaving behind widespread flooding, fatalities, and extensive damage.

Clean-up efforts have already begun in some of the hardest-hit areas. St. Lucie County experienced at least nine tornadoes, resulting in five fatalities.

As residents begin returning home to assess the damage, Florida Governor Ron DeSantis announced that the state is rapidly working to restore power to millions of customers currently without electricity and to replenish fuel supplies.

In Hillsborough County, flooding was severe, with the County Sheriff saying "I've never seen flooding like this."

The sheriff said the department helped rescue 135 elderly and disabled people earlier who had been evacuated from Bradenton for safety, CNN reports.

Reports of severe damage to homes have also gone out, especially in the most affected areas with the strongest winds including, Sarasota, St. Petersburg, Tampa, and Bradenton.

A total of at least eight fatalities have been confirmed so far.

#### Agriculture impact

Although it is still too early to fully assess the extent of Hurricane Milton's impact on Florida's agriculture, local farmers had been preparing for the worst.

Matthew Joyner, Executive Vice President and CEO of Florida Citrus Mutual released a statement on Tuesday saying that although experience has taught members of the citrus industry that the expected path had the potential to change at any point, the organization still "encouraged all to plan and prepare."

"Florida Citrus Mutual is prepared to



work with FDACS, FDOC, and other partners to ensure access to the resources necessary to begin moving forward with recovery once the storm has passed," Joyner said.

"We understand that the potential impact to our industry is critical, however, we also know that the safety and well-being of you, our growers, and your families and staff is the number one..."

[Read full article HERE](#)

*produce in* **PEAK** *for October*

Apples	Cranberries	Pears
Artichokes	Figs	Plums
Beets	Leeks	Turnips

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!

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