

Market **OUTLOOK**

Week 40: September 30 - October 6, 2024



Market ALERT

- Asparagus
- Banana
- Beans
- Berries
- Broccoli
- Cabbage
- Citrus
- Grapes
- Green Onions
- Herbs
- Melons
- Pears
- Pineapples

transportation

Nat'l Diesel Avg: \$3.185↓

Last Year: \$2.533↓

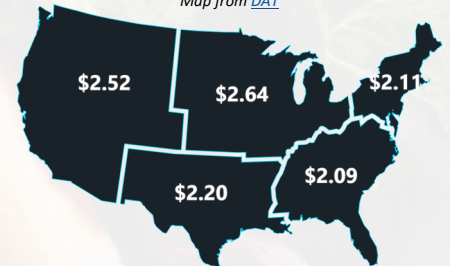
Nat'l Fuel Surcharge: \$0.46

Shortages: Freight rates is flat

- **extreme** - none
- **slight** - DE, IN, IL, & VA

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 60s.

Salinas, CA: Partly cloudy and sunny skies with highs in the 80s to 70s and lows in the 50s.

Yuma, AZ: Sunny skies with highs in the 110s and lows in the 70s.

Immokalee, FL: Thunderstorms with highs in the 90s and lows in the 70s.

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 70s and lows in the 40s.





Market UPDATE

apples



The CA storage 2023 apples are finishing quickly due to high demand and supply. Gold Delicious is tight. New crop Golden Delicious is expected to start this week. CA Reds are still available as new crop reds are starting mid-September. The Granny Smith market is tightening as many shippers are done for the season. New crop Granny Smiths should start mid-September. 2024 crops are expected to see a price increase due to a 12 million box deficit from the 2023 season.

asparagus



The West Coast and Peru are experiencing a transition in growing areas, causing low supply. Prices and pro-rates have increased, but better production is expected in the coming weeks. White asparagus is in good supply. However, potential disruptions due to weather in the eastern Gulf of Mexico could cause delayed departures from Central America.

avocados



The size curve is not performing as predicted, with most promotions on smaller fruit driving fields pricing up. The pricing gap will narrow between 48s and 60s. The Aventajada crop is not contributing due to new dry matter requirements but when it starts, the volume is expected to be strong through Super Bowl, with larger sizes dominating the size curve for November and December.

bananas



RADAR Please consider the port strike and the impending hurricane-related weather in the Southeast, advised proper planning with local DCs and promptly submit POs, despite no anticipated interruptions, and ensuring fruit quality.

beans



Green Beans: Supplies are improving, but the market is still elevated. Expect a potential gap in the next few weeks due to field transition and Hurricane Helena's impact on quality and suppliers.

Snow Peas: Guatemalan production is improving, while Peruvian peas are available in Miami, but their quality is subpar.

berries



Blackberries: **RADAR** Prices remain stable, with fair quality in Mexico and good quality in Watsonville. Volumes have peaked and will decline until early October. Overall, production is decent, with good results expected through mid-October.

Blueberries: **ALERT** Prices are escalated due to limited quantities in the Pacific Northwest as the season ended sooner than anticipated, and the quality is not great. There will be a gap before the import season, leading to a very short supply in September and October.

Raspberries: **RADAR** Prices remain stable, with fair quality in Mexico and a potential increase in volume through September. In Watsonville, quality is good but production has declined, with minimal volume available until October before the season ends.

Strawberries: Prices are decreasing, with fair quality from Salinas, Santa Maria, and Watsonville. The Santa Maria's fall crop quality is good, with some bronzing occurrences. Volume is on track for peak production next week. Watsonville/Salinas quality is good, with some dark fruit occurrences. Overall output volume is decreasing week-over-week as fall progresses.



Market UPDATE

broccoli



Broccoli: Supply is light from Salinas and Santa Maria, with demand increasing. Mexico is limited, and the quality is only fair. The market pricing is active, expected to escalate for another two weeks.

Broccolini: Supply is limited with good demand and quality. Limited supplies are expected in the coming weeks, along with increased prices.

brussels sprouts



The supply is on budget, quality has improved, demand is good, and market pricing has also improved. 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. Market pricing has increased this week, and supplies will be light 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. Expect supplies and market pricing to remain steady.

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: ALERT The market is stabilizing as new crops are harvested. Small fruit is peaking, but high humidity is causing skin issues. Large sizes will be limited, causing a noticeable price gap between small and large fruit. Overall pricing should stabilize through October.

Lemons: District 3's harvest is accelerating, with packing of the new crop starting next week. High-quality, normal-sized fruit is expected, with limited U.S. supply for two weeks, but incoming imports will help meet volume needs.

Oranges: ALERT Pricing is high. Valencia is mostly finished, with few suppliers offering limited volumes and poor to fair quality. Domestic Navel crop is expected to begin in late October.

corn



The pricing has increased due to the transition in the east, resulting in lighter supplies, while the west is facing lighter supplies and quality issues.

cucumbers



Pricing remains stable, with eastern growing areas finishing up, eastern North Carolina harvesting good volumes and quality, western supplies improving, and Baja and Central Mexico producing high-quality cucumbers.

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.



Market UPDATE

herbs



There is a good supply and quality of all herbs, except for dill and thyme, which are being impacted by weather conditions in Mexico, Peru, and Colombia. Additionally, chervil production remains low.

Cilantro: ALERT Supply is limited, with only fair quality reported. Demand has increased, with supplies shipping out of Oxnard and Salinas. Supply is expected to be limited for the next few weeks with an elevated 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: The supply is good, demand has increased, and sizing and weights are expected to improve in the coming weeks, with quality reported as good and markets remaining steady.

Iceberg: The supply and quality have improved, with increased demand and improved weights and yields. Sizing is expected to improve, and pricing is expected to remain steady in the coming weeks.

Romaine: Supplies are on budget, with fair to good quality. Good demand, with supplies coming from Salinas and Santa Maria. Supplies are expected to remain steady in the coming weeks, with growers reporting improved quality and weights and markets for hearts becoming more active.

Tender Leaf: The supply continues to be steady, 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 slightly higher due to cooler weather, causing a shortage of jumbo fruit. However, supply is improving for 9ct and 9J sizes, while 12ct and 15ct sizes are short. The quality is good, with a slight shift from the higher-color fruit that was more common during the summer. The flavor profile is strong, with brix levels in the 12-14% range. California production is expected until mid-October and Yuma to start.

Honeydew: RADAR Production has stabilized with a wide range of sizes available, but external scarring has increased in current fields, despite maintaining excellent internal quality with excellent flavor and brix.

mushrooms



Growers report good-quality mushrooms, 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.

onions green



EXTREME Limited supplies, primarily from Mexico, with an increased demand. Growers are recovering from heatwaves in Northern Mexico, causing market pricing to react and expected to increase in the coming weeks.



Market UPDATE

pears



RADAR The Northwest pear crop in Washington/Oregon has seen 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 by 1 to 2 sizes. Anjous have experienced a 30% decrease, 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% from last year, but is mostly affected, making it difficult to determine the end date, but anticipating to start winding down end of January to mid-February. The market pricing is expected to be escalated all season.

peppers bell



The pricing remains stable with good green bell supplies from the east and steady supplies from the west, while colored bell pepper supplies have improved, but pricing remains strong.

peppers chili



The pricing remains stable, with good supplies from the west and lighter supplies from the east due to growers winding down.

pineapples



RADAR Please consider the port strike and the impending hurricane-related weather in the Southeast. Supplies are limited, so consider being flexible in sizing and exploring 8ct and possibly 7ct for optimal service levels. Volumes are increasing week-over-week, reaching strong volumes in September and peak volumes on larger sizes in October.

potatoes



The Idaho market is slightly up for smaller sizes and down on larger sizes, with good quality. The early forecast for the upcoming season is down by 0.4% due to growers planting less acreage. Despite the decrease, Idaho is expected to continue to have plentiful availability. The USDA's first estimate for 2024 is expected in early November.

squash



The pricing remains stable, but supplies have slightly decreased in the west due to cooler weather, while the east continues to offer better zucchini and lighter yellow squash.

tomatoes



The pricing is consistent and of good quality. Supplies from both coasts have remained consistent, with grape having the lightest volume.



Market UPDATE

in the news...

East Coast ports brace for disruptions from labor dispute

By [Tom Karst](#) September 26, 2024 | [The Packer](#)

A labor impasse on U.S. East Coast ports between the International Longshoremen’s Association and the United States Maritime Alliance threatens to halt operations and cause damage to supply chains and to the economy, according to container marketplace firm Container xChange.

With an Oct. 1 deadline for negotiations, industries across the nation are bracing for significant disruptions if a strike occurs, according to a news release.

Essential goods, including imported retail items, automotive parts, and perishables could be stranded at ports or rerouted at considerable expense, the release said.

The strike could severely challenge importers of perishables, including fresh produce. For example, USDA statistics show that 37% of all bananas imported to the U.S. in 2023 were imported through the Philadelphia port

district, which also includes Wilmington, Del.

“The strike could push the container trade into chaos, with ripple effects that potentially will disrupt supply chains well,” Christian Roeloffs, co-founder and CEO of Container xChange, said in the release. “The congestion and delays at these major ports will severely impact the availability of containers, increase costs, and disrupt schedules. Small traders, in particular, may feel the squeeze as they are more vulnerable to price surges and extended delays in securing and moving their boxes. Businesses are acting now to reroute shipments and secure their container supply, or they risk being left stranded in a congested and costly aftermath.”








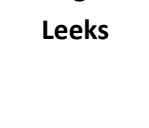

Container xChange said immediate supply chain challenges include stranded cargo, rerouting challenges and cost escalations.

Rerouting shipments to West Coast ports or alternate East Coast ports could create a logistical bottleneck, especially for goods requiring passage through the Panama Canal, according to the release, which noted that Maersk has already announced a disruption surcharge for all cargo moving to and from U.S. East Coast and Gulf Coast terminals, starting Oct. 21. The surcharge will be \$1,500 per 20-foot equivalent unit and \$3,000 per 40-foot equivalent unit (FEU), depending on the extent of the supply chain disruption, Container xChange reported.

Some recommended moves for supply chain participants include rerouting shipments, prioritizing high-value and critical goods, expediting customs and clearance and diversifying diversify suppliers....

[Read full article HERE](#)

produce in **PEAK** *for October*

	Apples		Cranberries		Okra
	Beets		Figs		Pears
	Cabbage		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 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



Powered by Foodbuy