



WEEK 47: November 20 - November 26, 2023

MARKET OUTLOOK

Transportation:

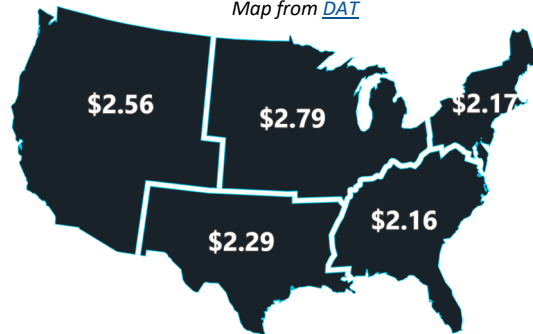
National Diesel Average: \$4.294

Compared to Last Year: \$3.275

National Fuel Surcharge: \$0.60

Shortages: Seeing steady freight rates, with **extreme** shortages - None; **slight** shortages - None

National Posted Rate per mile
previous week's average outbound reefer rate for each region
Map from [DAT](#)



Regional Weather Update:

Oxnard, CA: Partly cloudy and sunny skies with highs in the upper 60s and 70s and lows in the 50s.

Salinas, CA: Cloudy skies with highs in the upper 60s and lows in the 40s.

Yuma, AZ: Partly cloudy and sunny skies with highs in the 70s and lows in the low 50s.

Immokalee, FL: Partly cloudy, thunderstorms, and sunny skies with highs in the 80s and lows in the 60s.

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 40s to 30s and lows in the 20s to mid-teens with snow showers on Thursday.

MARKET ALERT

- Asparagus
- Beans: Green Beans & Snow Peas
- Berries: Blackberries, Blueberries (Force Majeure) & Strawberries
- Broccolini
- Carrots
- Cauliflower
- Celery
- Corn
- Grapes
- Iceberg
- Mushrooms
- Pepper Chili
- Tomatoes

MARKET OUTLOOK

Apples



SUPPLY

GOOD

QUALITY

GOOD

The Washington State Apple Crop is experiencing strong growth and good supply, with an estimated 2023 crop of 134 million boxes, compared to 110 million this past season. The size profile benefits the foodservice industry, with a peak of 100/113ct and more 125s than 88ct. All varieties, from Red Delicious to Cosmic, have seen substantial gains, resulting in better value and availability throughout the season. Summer 2024 won't bring Granny Smith's prices to Washington like they did recently. The growing conditions have been ideal, and no weather issues have been reported.

MARKET ALERT

Asparagus



SUPPLY

FAIR

QUALITY

GOOD

Asparagus production in southern Baja is steady, with higher elevations in the Sonora desert opening. Because of El Nio, Peru is now at about 60% of their normal volume for this season. The volume is expected to increase. Markets are less active, with more volume coming from Mexico and Peru.

Avocados



SUPPLY

GOOD

QUALITY

GOOD

Last week's harvest was only 49.7 million lbs., a 22% reduction from the previous two weeks. Demand has been sluggish due to other commodities taking center stage for Thanksgiving, and Mexico is allowing fruit size up compared to continuing to harvest heavy with declining field pricing. Mexico's avocado harvest is postponed due to Revolution Day, but standing inventories are increasing, reaching 58.8 million lbs., and avocados remain in the top ten for promoted fruits. The size curve coming off the trees is showing signs of sizing up as 40s and larger fruits become more available. Despite the flat demand of November, demand and price points are expected to pick up in December, with a push to increase national volumes.

Bananas



SUPPLY

GOOD

QUALITY

GOOD

The disruptions in Guatemala are more under control and allowing trucks to pass, resulting in an improved supply chain and a return to its pace. No major issues at this time.

MARKET ALERT

Beans



SUPPLY

FAIR

QUALITY

FAIR

Green Beans: Supplies remain limited. Production is improving with harvesting starting in Florida. Mexico's green bean production, availability, and quality have been significantly impacted by rain and hurricanes. The market is escalating.

Snow Peas: Markets are active, but the supply is light. Rain in growing regions is affecting harvest and quality, leading to increased prices. Improvements are expected in the next week.

MARKET OUTLOOK

MARKET ALERT

Berries



SUPPLY

BAD

QUALITY

FAIR

Blackberries: **ALERT** Prices for Blackberries are trending up. Supplies remain tight due to weather related challenges. Growers are reporting good quality.

Blueberries: **FORCE MAJEURE** Prices for Blueberries are trending down. Prices are still elevated, and volume remains limited. Recent Hurricane activity and cool weather has impacted crops for the long term. Growers are expecting the market to tighten back up later this month through December.

Raspberries: Prices for Raspberries are stable. Production is coming out of Mexico. Growers are forecasting increasing supplies in the coming weeks.

MARKET ALERT

Broccoli



SUPPLY

FAIR

QUALITY

FAIR

Broccoli: Supplies are light with strong demand. Supplies are available from Santa Maria, Yuma, and Mexico. Growers are reporting lower yields. Market pricing is active, and supplies should be light in the next few weeks. Prices will be escalated. (F.O.B. pricing for this week \$24.00 - \$25.00)

Broccolini: **ALERT** Supplies continue to be light. Demand has increased. Supplies are expected to be limited for a few weeks. Growers are reporting brown bead and flowering defects. Yields are affected by quality issues. Supplies will be light for the next few weeks due to the transition to Yuma. Market pricing continues to be escalated. (F.O.B. pricing for this week \$23.55 - \$24.75)

MARKET ALERT

Brussels Sprouts



SUPPLY

FAIR

QUALITY

FAIR

Supplies are starting to show signs of improvement. Quality is reported as improved. Demand is strong. Market pricing seems to be improving. Supplies are starting to improve. (F.O.B. pricing for this week \$30.00 - \$32.00)

Cabbages



SUPPLY

GOOD

QUALITY

GOOD

Supplies are steady with good quality. Growers are reporting better availability. Market pricing has improved. Products are coming from Oxnard and Santa Maria. (F.O.B. pricing for this week \$15.00 - \$17.00)

Cantaloupes



SUPPLY

GOOD

QUALITY

GOOD

Guatemalan cantaloupes arrived in Florida with excellent internal quality, brix levels in the 14 -17% range, and an excellent flavor profile, despite having a greener caste, which is normal for this time of year. Most sizes are 9s and larger, with a few 12s. Offshore melons are expected to arrive in California by the end of the month.

MARKET OUTLOOK

MARKET ALERT

Carrots



SUPPLY
FAIR
QUALITY
GOOD

Mexico's carrot region is facing challenges due to water and germination issues, causing crop losses and further complicating the domestic market. California and other regions are also facing weather-related challenges, with jumbos and cellos in low supply. Prorates may be expected, and table carrots may be a good substitute. Tropical storm Hilary disrupted plantings in Imperial Valley, Riverside County, and Kern County, causing a week delay in planting and reduced yields. Hurricane Idalia's devastation in Georgia has significantly affected carrot farms, potentially impacting January volume.

MARKET ALERT

Cauliflower



SUPPLY
FAIR
QUALITY
FAIR

Supplies are light with strong demand. Supplies are available from Santa Maria, Yuma, and Mexico. Growers are reporting lower yield. Market pricing has escalated. Supplies will be light for the next few weeks due to the transition. (F.O.B. pricing for this week \$20.00 - \$21.00)

MARKET ALERT

Celery



SUPPLY
FAIR
QUALITY
FAIR

Supplies are light. Quality is fair. Supplies are currently coming from Salinas and Santa Maria. Market pricing has escalated. Supplies will be light for the next few weeks as the Salinas crop is winding down. Prices will be escalated for a few weeks until Oxnard starts. (F.O.B. pricing for this week \$22.00 - \$24.00)

Citrus



SUPPLY
FAIR
QUALITY
FAIR

Limes: The market is approaching stability due to a slow decline in pricing and holiday demand. Volume has increased, and quality/shelf life is improving. Peak sizing consists of small fruit, with large fruit limited until Q2 2024. Supply is expected to remain abundant through November, then decrease in December.

Lemons: Fruit has started in District 3 (Desert region), with loading in Yuma and Mecca. Supplies are limited and will remain tight until early November. District 1 (Central Valley) will begin operations in mid-November. Because of Mexico's limited availability and 75% choice yield, prices will remain high.

Oranges: Navels are expected to begin the second week of November if the fruit meets the required Acid to Brix ratios. Production of packable fruit is slightly down by 5% from last season, with more Choice than Fancy. The late Navel crop is expected to be light industry wide.



MARKET OUTLOOK

MARKET ALERT

Corn



SUPPLY

FAIR

QUALITY

FAIR

Prices for Corn are trending down. Production for the East is moving down to South Florida. Production out of the West is coming out of California. Growers is expecting the markets to come off after the Thanksgiving Day Holiday.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Slicing Cucumbers are trending up. Supplies are tightening up for the Thanksgiving Holiday demand. Production is coming out of Florida and Mexico.

Garlic



SUPPLY

GOOD

QUALITY

GOOD

Domestic garlic has improved with steady supplies. Quality is good and the price remains elevated.

Ginger



SUPPLY

FAIR

QUALITY

GOOD

The market for imported ginger is active, and supplies are light.

MARKET ALERT

Grapes



SUPPLY

FAIR

QUALITY

GOOD

California red seedless grape volumes are decreasing, while green grapes remain. Peruvian grape volume is increasing, and pricing remains steady. The pricing appears to be steady, but it may increase once California completes.

MARKET OUTLOOK

Herbs



SUPPLY
GOOD
QUALITY
GOOD

The quality of herbs has improved with better weather conditions in the east coast, but inconsistent supply on the west coast remains due to weather-related issues.

Cilantro: Supplies are slightly better with fair quality. Market pricing has improved. Supplies are shipping out of Oxnard and Santa Maria. Growers are expecting supplies and markets to improve in the next few weeks. (F.O.B. pricing for this week \$15.00 - \$17.00)

Honeydews



SUPPLY
GOOD
QUALITY
GOOD

Guatemalan honeydews are just getting started, with mostly jumbo fruit.

MARKET ALERT

Iceberg



SUPPLY
FAIR
QUALITY
FAIR

Supplies are light. Quality is fair. Weights are expected to be on the lighter side with smaller lettuce heads. Yields will be light as growers transition to Yuma. Growers are in their final days in Huron. The market is active due to the transition and the Thanksgiving holiday. (F.O.B. pricing for this week \$22.00 - \$24.00)

Kale



SUPPLY
GOOD
QUALITY
GOOD

Supplies are steady with good quality and demand. Supplies should remain steady for a few weeks along with market pricing. (F.O.B. pricing for this week \$11.65 - \$13.65)

Leaf



SUPPLY
GOOD
QUALITY
GOOD

Green & Red Leaf: Supplies are light. Quality is fair with irregular sizing, light fringe burn, and some seeder. Markets are expected to be active in the next few weeks. Growers are starting the transition from Salinas to Yuma. Light supplies are expected for the next few weeks with some increased markets. (Green Leaf F.O.B. pricing for this week \$14.00 - \$16.00)(Red Leaf F.O.B. pricing for this week \$15.00 - \$17.00)

Romaine: Supplies are light with fair quality. Romaine Hearts is experiencing some light cupping. Carton weights are fair. Expect market pricing to be active and light supplies during the transition to Yuma and the Thanksgiving holiday. (Romaine F.O.B. pricing for this week \$14.00 - \$16.00)(Hearts F.O.B. pricing for this week \$18.00 - \$20.00)

Tender Leaf: Supplies are steady with good demand. Quality is good to fair. Supplies and availability are improving due to better weather. Steady market pricing and supplies are expected. Supplies are not expected to be impacted during the transition. (F.O.B. pricing for this week \$4.75 - \$5.00)

MARKET OUTLOOK



MARKET ALERT

Mushrooms



SUPPLY
FAIR
QUALITY
FAIR

Mushroom supplies are expected to be tightened up for the holidays due to quality issues with raw ingredients in compost. Markets are expected to react to these limited supplies, leading to a escalated price.

Onions



SUPPLY
GOOD
QUALITY
GOOD

Quality is good to excellent in all growing regions with steady demand. The market is steady. All colors and sizes are shipping out of the Northwest. Colorado has all colors and sizes available. Medium are a little tight for the holiday. Freight is slightly up but trucks are available. This will also have an impact on precut.

Onions Green



SUPPLY
GOOD
QUALITY
GOOD

Supplies have improved. Current supplies are coming from Mexico. Markets will not be escalated. Expect good quality for the next few weeks. Supplies and quality will improve in the next few weeks. (F.O.B. pricing for this week \$12.00 - \$14.00)

Pears



SUPPLY
GOOD
QUALITY
GOOD

The Pear crop is expected to be of excellent quality, like the Apple Crop. Bartlett Crop is projected to have the same amount as last season, while Bosc is expected to have a larger crop, making prices on 100s and smaller better. Red Pears are expected to peak on 80/90ct, while Anjou's in the Pacific Northwest is down by 20%. Overall, the quality is good with size a profile 80/90/100ct.

Peppers Bell



SUPPLY
GOOD
QUALITY
GOOD

Prices for Green and Red bell peppers are mostly steady. Production is moving from Georgia to Central and South Florida. For the West, production is coming out of California and Mexico.

MARKET ALERT

Peppers Chili



SUPPLY
BAD
QUALITY
POOR

Prices for Chili Peppers are trending up. Production out of Georgia is winding down while Florida is getting started. Volume for the West is coming out of California and Mexico. Supplies remain extremely tight but are expected to increase in the weeks to come.

MARKET OUTLOOK

Pineapples



SUPPLY
GOOD
QUALITY
GOOD

The Golden variety fruit's internal coloration and physiological maturity remain consistent, with 100% of the fruit at the perfect B level. The flavor and aroma remain consistent, with no reported brix lower than 13.5. The percentage of fruits with brix higher than 15.5 increased significantly. Small sizes declined to 5.5% of harvest, while medium and large fruit sizes rose significantly to 29% and 56.1%, respectively.

Potatoes



SUPPLY
GOOD
QUALITY
GOOD

Good quality from all growing regions. The market continues to trend down. Because of improved yields and increased acreage, Idaho is expected to have abundant Russet potato supplies this year. Good time to promote potatoes. This will also affect precut.

Squash



SUPPLY
GOOD
QUALITY
GOOD

Prices for Yellow and Zucchini Squash are trending up. Supplies are tightening up for the Thanksgiving Holiday demand. Production is coming out of Georgia, Florida, and Mexico.

MARKET ALERT

Strawberries



SUPPLY
POOR
QUALITY
FAIR

Prices for Strawberries are trending up. Production is coming out of Oxnard, Salinas, Santa Maria, and Watsonville. Supplies are tight due to the cool, wet weather last week.

MARKET ALERT

Tomatoes



SUPPLY
POOR
QUALITY
FAIR

Prices for 20 lb Round, Grape and Roma tomatoes are trending up. Prices for 25 lb Round tomatoes are trending down. Production out of Central and South Florida continues to slowly ramp up. Baja and Eastern Mexico are covering the West. Sinaloa and Culiacan will start in December or January.

Watermelons



SUPPLY
GOOD
QUALITY
GOOD

Watermelons are in good supply on seedless and minis, with limited supplies in Florida. Mexico volumes are crossing in Texas and Nogales. The market is slightly trending down.



MARKET OUTLOOK

Produce Category Overview

The annual transition from Salinas to Yuma has started, which will have an impact on all Green Leaf, Iceberg Lettuce, Romaine Lettuce, Romaine Hearts, Processed Salads, and Baby Tender Leaf items such as Spring Mix, Baby Arugula, and Baby Spinach. Expect to see several challenges this month.

Asparagus are limited in all growing regions but expected to improve in 2-3 weeks. **Blackberries** are escalated with tight supplies due to the weather. **Blueberries (FORCE MAJEURE)** prices are escalated with limited supplies expected to last through late December. **Carrots** are short on jumbo and cello due to weather. **Chili Peppers** remain tight due to the weather. **Limes** market is escalated, particularly on large fruit. **Mushrooms** are tight for the holiday. **Strawberries** are tight due to the cold weather in California. **Broccoli, Broccolini, Cauliflowers, Celery, Iceberg lettuce, Green & Red Leaf, and Romaine** will be light on supplies for the next few weeks due to the transition. Great time to promote **Potatoes**.

Chilean blueberry opens season with U.S. exports uptick

November 16, 2023 | published by FreshFruitPortal.com

The 2023-24 Chilean blueberry season is underway, with overall shipments now at 1,500 tons, representing a 25% increase year-on-year.

Chilean Blueberry Committee Executive Director Andrés Armstrong tells FreshFruitPortal.com that this figure represents only a 2% of the season's projection. The sector has continued to work on varietal change, looking to more cost efficient cultivars.

Armstrong says that, while they are seeing some degree of varietal change this season, this is yet to translate to export volumes.

"In the short term, this means that we are going to be lowering our volume, probably next season as well, but we are going to be improving our export base," he indicates.

Regarding the varieties exported to date, Armstrong says the main varieties exported are Ventura, the new CB1219, Emerald, Rocío and Suzie Blue.

"Of what we have exported today, 53% corresponds to new varieties," he points out.

According to Armstrong, the start of the season has been very atypical, "we have shipped 25% more fruit and it is concentrated in Asia, with 56%, and in the U.S. with 42%. Then comes Canada, Europe and the Middle East."

He specifies that U.S. shipments have tripled its volume, while Asia remains the main market to start the season, with a strong presence in Korea, Japan and Taiwan.

"To date, the volume of Asia, if we compare it with the previous season, shows a 7% drop. There have been opportunities in the U.S. where there is an increase of 122% to date. There are opportunities with organic products, where 60% of what we have shipped to date to the U.S. is organic," he says.

As for marketing strategies, the executive director explains that the committee is working on improving quality improvement procedures, as well as logistics.

"This season we're re-launching our Blueberry Express service to the U.S., which allows us to have the fruit in the market within two weeks or less. Everything is ready to begin with this service, and we hope to be arriving by week 48 of 49 to the east coast," Armstrong says.

[Read full article HERE](#)

MARKET OUTLOOK

Fall Transition Schedule | 2023 Yuma Season

Grower/Shipper	Current Location	Transitioning	Commodity	Transition Dates	CITY	Transition Dates	CITY
Bengard Ranches	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Yuma, AZ	Cauliflower			11/27/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Huron, CA	Lettuce Iceberg	10/16/23	HURON, CA	11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Lettuce Green Leaf/Red Leaf	10/9/23	OXNARD, CA	11/13/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Lettuce Romaine	10/4/23	OXNARD, CA	11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Celery	11/27/23	OXNARD, CA	11/27 - 6/10/24	OXNARD, CA
Church Brothers	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/21/23	YUMA, AZ
Church Brothers	Salinas, CA	Yuma, AZ	Cauliflower			11/21/23	YUMA, AZ
Church Brothers	Salinas, CA	Huron, CA	Lettuce Iceberg	10/20/23	HURON, CA	11/4/23	YUMA, AZ
Church Brothers	Salinas, CA	Yuma, AZ	Lettuce Green Leaf / Red Leaf			11/15/23	YUMA, AZ
Church Brothers	Salinas, CA	Huron, CA	Lettuce Romaine	10/12/23	HURON, CA	11/8/23	YUMA, AZ
Church Brothers	Salinas, CA	Oxnard, CA	Celery			11/6/23	OXNARD, CA
Church Brothers	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Broccoli Crowns			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Cauliflower			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Iceberg			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Green Leaf / Red Leaf			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Romaine			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
Green Gate Fresh	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/27/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Yuma, AZ	Cauliflower			11/27/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Iceberg	10/16/23	HURON, CA	11/19/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Green Leaf / Red Leaf	10/9/23	HURON, CA	11/17/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Romaine	10/5/23	HURON, CA	11/17/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Oxnard, CA	Celery	11/27/23	OXNARD, CA	11/27 - 6/10/24	OXNARD, CA
Taylor Farms - CA	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
The Salad Farm	Hollister, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ

Have you ever wondered what happens during a transition? Click on the video link below to see all of the actions.

Taylor Farms [Video](#)

Church Brothers [Video](#)

If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to dforsythe@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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