



## WEEK 12: March 20 - March 26, 2023

# MARKET OUTLOOK

### Transportation:

**National Diesel Average:** \$4.247

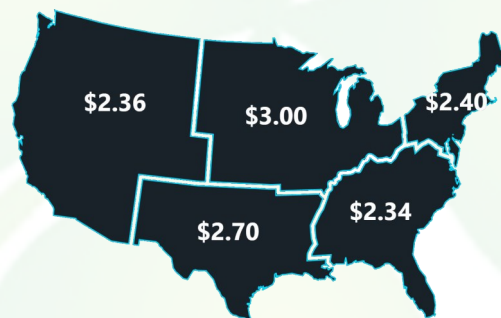
**Compared to Last Year:** \$3.244

**National Fuel Surcharge:** \$0.56

**Shortages:** Seeing high freight rates, with **extreme** shortages - None; **slight** shortages in FL & NC

### National Posted Rate per mile

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



### Regional Weather Update:

**Oxnard, CA:** Cloudy, rain/shower and sunny throughout the week with highs in the 50s and lows in the 50s to 40s.

**Salinas, CA:** Rain, showers and cloudy skies throughout the week with highs in the 50s and lows in the 40s.

**Yuma, AZ:** Cloudy and sunny skies through the week with highs in the 70s and lows in the 60s to 40s.

**Immokalee, FL:** Cloudy and sunny skies throughout the week with highs in the 70s to 90s and lows in the 60s morning showers on Monday.

**Idaho Falls, ID:** Cloudy with rain/snow showers throughout the week with highs in the mid-30s and lows in the 20s to upper-teens.

### MARKET ALERT

**Arugula Baby**

**Berries: Blackberries, Blueberries & Strawberries**

**Broccolini (Extreme)**

**Cabbage**

**Carrots (Radar)**

**Cauliflower**

**Celery**

**Chili Peppers: Jalapeno & Serrano**

**Cucumbers: English**

**Herbs: Chervil**

**Limes (Radar)**

**Mushrooms (Extreme)**

**Pepper Bell: Green**

**Squash**



# MARKET OUTLOOK



## Apples



SUPPLY  
FAIR  
QUALITY  
GOOD

With less than 100 million cases, WA crop is the smallest since 2005 with the average usually more than 120 million. Their low volume is a significant issue for growers in Washington State. There is a lack of supplies, a high demand, and obviously regional supplies exist. Michigan and New York both have good crops, so it's about how WA can stay in for as long as possible and take advantage of the various varieties that have been grown. The cost of production labor has skyrocketed. Expecting to remain tight through the season until offshore arrives in April.

## **MARKET ALERT**

## Arugula



SUPPLY  
LIMITED  
QUALITY  
FAIR

**ALERT (Baby)** Supplies are limited. Some growers fare better than others. Expect quality to be only fair. Some growers are keeping everyone to strict loading averages and are prorating orders. This market will be volatile for a few weeks. (F.O.B Pricing for this week - Contract pricing)

## Asparagus



SUPPLY  
GOOD  
QUALITY  
GOOD

In preparation for the Easter weekend, the asparagus market is leveling off. Standard and Large have excellent volume, but XL and Jumbo remain light. Mexico's volume is still excellent. Due to market conditions, Peru has slowed air cargo. Due to production from Mexico and Peru, the market is slow.

## Avocados



SUPPLY  
GOOD  
QUALITY  
GOOD

Strong avocado demand has kept the supply-demand ratio close. Despite the fact that there is still a good supply of the current Mexican crop on the trees, some growers have shown some restraint with harvest quantities and improving markets and have decided to hang in for a potential further upward pricing trend, thereby increasing field pricing in recent weeks. Past 8 weeks or so, the volume coming in from Mexico has been on average 10% lower than initial forecasts. With a healthy demand, Mexico's next holiday is Benito Juarez Day on Monday, March 20th, therefore production will be halted. The Mexican fruit has a high oil content with a robust flavor profile. Fruit is ripening faster; thus it is critical to maintain a cold chain and store at 38°F. In the same box, the fruit's skin may show several colors. This is a reminder that the color of the skin does not indicate fruit maturity. California season is off to a slow start, with harvest falling short of 1 million lbs per week. With the stronger Mexican market and favorable weather conditions in California, harvest volumes may improve slightly in the coming weeks.

## Bananas



SUPPLY  
GOOD  
QUALITY  
GOOD

Banana volume has stabilized due to improved weather in the tropics. Banana are more in line with the desired ripening stages.

## Beans



SUPPLY  
GOOD  
QUALITY  
GOOD

**Green Beans:** Supply is good, and market is steady. Quality is good. No supply issue expected unless Mother Nature says otherwise.

**Snow Peas:** Supplies have slowed down due to market condition and quality out East. Supplies and market out West is steady.



# MARKET OUTLOOK

**MARKET ALERT**

**Berries**



**SUPPLY**

FAIR

**QUALITY**

FAIR

**Blackberries:** **ALERT** Prices for Blackberries are trending slightly up. Supplies were impacted by heat this week. Supply and quality are both fair. Growers expect the market to tighten back up again in April and May.

**Blueberries:** **ALERT** Prices for Blueberries are trending slightly up. Volumes out of Mexico are expected to pick up in the weeks to come. California continues to see record rains, which is cutting into the domestic production. Supply is fair with good quality.

**Raspberries:** Prices for Raspberries are trending down. Supplies are currently steady. Growers expect the market to tighten back up again in April and May. Supply and quality are both good.

**MARKET ALERT**

**Broccoli**



**SUPPLY**

SHORT

**QUALITY**

GOOD

**Broccoli:** Supplies are light, and demand are good. Market pricing has escalated. Supplies are coming from Yuma, Santa Maria, and Mexico. Supplies are expected to be limited due to the previous cold weather in Yuma. (F.O.B pricing for this week \$20.00 - \$21.00)

**Brocolini:** **EXTREME ALERT** Supplies continue to be very short due to the unusual cold weather. Demand exceeds supplies. Quality is Fair. Growers are pro-rating orders to try and supply everyone with something. Market is expected to remain unstable for a few weeks. (F.O.B. pricing for this week \$42.50 - \$44.55)

**Brussels Sprouts**



**SUPPLY**

GOOD

**QUALITY**

GOOD

Supplies continue to be very good. Quality is good. Demand continues to be steady. Good volume from Mexico. Steady demand is expected the next few weeks. (F.O.B pricing for this week \$16.45 - \$18.65)

**MARKET ALERT**

**Cabbages**



**SUPPLY**

LIMITED

**QUALITY**

FAIR

Supplies continue to be limited but are showing sign of improvement. Growers are reporting better availability. Market pricing has improved. Product is coming from Yuma and Imperial Valley. (F.O.B pricing for this week \$18.00 - \$23.00)

**Cantaloupes**



**SUPPLY**

FAIR

**QUALITY**

GOOD

Offshore cantaloupe continues to be light with weak demands. A temporary increase in 12ct Honduran volume has hit the market, creating a market adjustment that is anticipated to finish by next week. On the West, Guatemalan production has switched from 9/12s to mostly 9s and larger, but the East coast and Texas are heavy on 12s. There will be a drop in arrivals the week prior to Easter holiday due to the transition of harvesting field. Quality has been great with good sizing and color. Brix level is 13%-15%.



A photograph of fresh produce including green beans, potatoes, and cherry tomatoes in blue crates, set against a rustic wooden background.

# MARKET OUTLOOK

## Carrots



SUPPLY

GOOD

QUALITY

GOOD

**RADAR** Rains in California could complicate matters in the carrot region. Although there hasn't been any immediate impact to date, plants scheduled to be harvested in 2-4 months could be affected, but it's still too early to know. A late summer/early fall crop is causing concern. Harvesting is now greatly hampered by the rain, and if it continues, the supply may be compromised. Some crops are heading to the desert this weekend, which will be a significant deciding factor in how the season goes.

**MARKET ALERT**

## Cauliflower



SUPPLY

LIMITED

QUALITY

GOOD

Supplies will continue to be light and market pricing remain escalated. Supplies are coming from Yuma, Santa Maria, and Mexico. Cold weather slowed down the growth causing short supplies. Supplies are expected to improve in the next week. (F.O.B pricing for this week \$36.00 - \$38.00)

**MARKET ALERT**

## Celery



SUPPLY

LIMITED

QUALITY

GOOD

Supplies continue to be limited, and quality is good. Supplies are coming from Oxnard and Yuma. Supplies from Oxnard are very limited. Demand is very strong. Market is expecting to escalate for next week. (F.O.B pricing for this week \$23.00 - \$25.00)

## Citrus



SUPPLY

GOOD

QUALITY

GOOD

**Limes:** **RADAR** Prices in Mexico continue to stay elevated but low demand in the US have slowed down and even reverted price escalation. Majority of the harvest have fully transition to the new production cycle. Crossings have dropped this week compared to last, with small fruit predominating; large fruit will be scarce moving forward. The second half of March through mid-April are expected to have low overall availability, which may put pressure on pricing stability. Expect a significant price difference between small and large fruit. Because of the lack of rain, quality flaws such as skin breakdown/oil spots are becoming more prevalent; fruit is extremely stressed, reducing overall shelf life. Blanching will become more visible when the fruit's general coloration darkens; please note the distinction between blanching and yellowing, as blanching is a quality defect and yellowing is a conditioned defect.

**Lemons:** California lemons are still being harvest in D1 and the fruit are still looking fine. Growers are packing mostly Fancy 115s and larger. D1 season will go until the first of June before it transitions to D2 and import lemons.

**Oranges:** Navels have hit their stride. Quality is great with nice brix and color. Until the end of the navels, size will remain an issue; it is now peaking on 113s, limited 56s, and larger. Most shippers will be done with the Navels at the end of May.



# MARKET OUTLOOK



## Corn



SUPPLY  
GOOD  
QUALITY  
FAIR

Prices for all varieties of Corn out of the East & West are trending significantly down. Production out of Florida will continue to ramp up in the weeks to come. Supplies out of Mexico are currently picking up a bit too. California is experiencing a lot of rain. Growers are waiting for better weather so they can assess the damage.

**MARKET ALERT**

## Cucumbers



SUPPLY  
GOOD  
QUALITY  
GOOD

**ALERT (English)** Prices for Slicing & Persian Cucumbers are trending down. Prices for English Cucumbers are trending significantly up. Volumes for Slicing Cucumbers is picking up out of Florida and Mexico. The English Cucumber market tightened up this week. Growers are reporting that English Cucumber crops are a bit behind due to weather.

## 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.

## Grapes



SUPPLY  
GOOD  
QUALITY  
GOOD

Arrivals continuing to increase and will likely be plentiful by mid-March. There are still a lot of Peruvian Grapes available. With the continuous growth in volume, Chilean grapes are starting to take the lead as the market's primary country of origin.

**MARKET ALERT**

## Herbs



SUPPLY  
GOOD  
QUALITY  
FAIR

Weather continues to have an impact on all Colombian herbs. Weather affects both imported and domestic **Chervils**. For the West coast, all varieties of herbs are having inconsistent production due to weather and low yield in the growing region. Quality is fair.

**Cilantro:** Supplies are better. Quality has improved along with market pricing. Product shipping out of Oxnard, Imperial Valley, and Yuma. Expect supplies to be limited going into next week. (F.O.B pricing for this week \$22.65 - \$24.25)



# MARKET OUTLOOK

## Honeydews



SUPPLY  
LIGHT  
QUALITY  
GOOD

Imported honeydew production continues to be light with market pricing still escalated. Sizing are primarily 5/6s. Light supplies are expected to through the rest of the season. External appearance has been clean with solid internal quality with good brix. Offshore honeydew has improved with appearance and sugar level.

## Iceberg



SUPPLY  
GOOD  
QUALITY  
FAIR

Supplies are very good, and quality has improved. Weights are back to normal. Supplies is expecting to be steady for a few weeks. Harvest is coming from Yuma and Imperial Valley. (F.O.B pricing for this week \$11.00 - \$12.00)

## Kale



SUPPLY  
FAIR  
QUALITY  
GOOD

Supplies are steady. Demand are good. Quality is good. Supplies should stay steady for a few weeks. Market pricing is steady. (F.O.B pricing for this week \$15.65 - \$16.65)

## Leaf



SUPPLY  
GOOD  
QUALITY  
GOOD

**Green & Red Leaf:** Supplies continue to be very good. Quality is fair. Expect to see Fringe burn, and some wind damage. Markets and supplies are stable. Harvest is coming from Imperial Valley and Yuma. (Green Leaf F.O.B. pricing for this week \$9.00 - \$10.00)(Red Leaf F.O.B. pricing for this week \$10.00 - \$10.50)

**Romaine:** Supplies and quality are both good. Weights are back to normal. Expect to see some epidermal peel and blistering. Growers are doing everything they can to pack the cleanest product possible. Harvest is coming from Yuma and Imperial Valley. (Romaine F.O.B pricing for this week \$11.00 - \$11.50) (Hearts F.O.B pricing for this week \$15.00 - \$16.00)

**Tender Leaf:** Supplies are steady. Demand continues to be good. Fair quality has been reported by growers. Market pricing is normal. Harvest is coming from Yuma. (F.O.B pricing for this week \$4.75 - \$5.15)



# MARKET OUTLOOK

**MARKET ALERT**

## Mushrooms



SUPPLY  
SHORT  
QUALITY  
FAIR

**Shitake Mushrooms: EXTREME ALERT** Due to uncontrollable rise in cost of imported Shitake logs from China. Shitake mushrooms supplies will be short, prices will be changing almost weekly. Long delays to unload shipments at the ports have caused some interruptions with supplies. This is caused by labor shortage and limited freight availability.

**EXTREME ALERT** The mushroom industry continues with a shortage of labor, as well as cost inflation increases in raw materials. Specifically corrugated cardboard and packaging materials. Additionally, the price increases in freights nationally have greatly impacted cost to mushroom growers. Pricing on mushrooms must increase at this time due to Labor, Transportation, and packaging.

## Onions



SUPPLY  
GOOD  
QUALITY  
GOOD

Onions are shipping out of Idaho, Oregon, Wisconsin, and Washington. Demand is down. Quality is good. Market is steady. Idaho, Oregon, and Washington will finish in the next week or two while Wisconsin will be available into July. Texas has started the season early, while Imperial Valley has been delayed due to cooler weather. Imperial Valley is expected to start in the last week of April. Import onions are winding down and will have a smooth transition to Rio Grande Valley. Super Colossal and Colossal Yellow onions continue to fetch a premium pricing due to the limited availability. All colors available. Planting for next season crops in the west has been delayed due to cold and rainy weather. Growers are waiting for the field to dry before beginning to plant. This will also have an impact on pre-cut.

## Onions Green



SUPPLY  
GOOD  
QUALITY  
GOOD

Supplies are better. Market has improved. Green onions are coming from Mexico. Abnormal cold temperatures have slowed down the supplies. Supplies are expected to continue to improve the next few weeks. (F.O.B pricing for this week \$16.00 - \$17.00)

**MARKET ALERT**

## Peppers Bell



SUPPLY  
FAIR  
QUALITY  
FAIR

**ALERT (Green)** Prices for Green Bell Peppers are trending up. Prices for Red and Yellow Bell Peppers are trending down. The Bell Pepper market is unstable as crops transition from Winter to Spring crops. Volumes are expected to pick up in the weeks to come.

**MARKET ALERT**

## Peppers Chili



SUPPLY  
FAIR  
QUALITY  
FAIR

**ALERT (Jalapeno & Serrano Peppers)** Prices for Chili Peppers are mostly steady. Prices for Jalapeno and Serrano Peppers remain elevated. The Chili Pepper market is transitioning from Winter to Spring crops. Volumes are expected to pick up in the weeks to come.



# MARKET OUTLOOK

## Pineapples



SUPPLY

GOOD

QUALITY

GOOD

Larger sized Pineapples volume is solid. Quality is good. In the tropics, the size curve is shifting toward smaller size pines.

## Potatoes



SUPPLY

FAIR

QUALITY

GOOD

Russet potatoes continue to be limited and demand is down. Storage crop are still available. Good supplies on new crops from Florida with excellent quality. Supply is steady and demand continues to be light. Market is steady due to the overall short crop this season. There is availability to meet demand. Precut potatoes will be impacted as well.

**MARKET ALERT**

## Squash



SUPPLY

FAIR

QUALITY

FAIR

Prices for Yellow & Zucchini Squash are trending up. New Crop production out of Florida is starting to ramp up slowly but the market remains tight. Supplies continue to be a bit tight out of Mexico due to recent rains and cold weather.

**MARKET ALERT**

## Strawberries



SUPPLY

FAIR

QUALITY

FAIR

Prices for Strawberries are trending down. Volumes for Strawberries out of Florida and Mexico are decreasing for they are past peak season. Weather is the wild card for fruit grown in California. Growers are expecting prices to increase over the week to come due to all the rain. Expect the market to be unstable and tight for the next 8 weeks.

## Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

Prices for 20 lb Rounds and Roma are trending up. Prices for 25 lb Rounds and Grapes are stable. Prices for Cherries are trending down. The tomatoes market is currently unstable. Growers are expecting the market to tighten up a bit in the weeks to come.

## Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Watermelons are a little tight. Seedless are shipping from Mexico while mini are out of Edinburg and Nogales. Quality has been good. Florida is expecting to start harvesting in March. California started with lower volumes due to the seasonal transition gap. Market is elevated.





# MARKET OUTLOOK

## Produce Category Overview

The produce industry continues to experience unprecedented quality and yield issues due to weather that caused crop failures, poor product quality, and impacted availability. The annual transition from Arizona's growing season to California is expected to happen soon, which will have an impact on all lettuces, greens, broccoli, cauliflowers, and cabbages. Due to the recent floods in the Salinas Valley, the transition dates from Arizona to California, are only tentative and are subject to change. **Tender leaf** and **Celery** growers are looking to transition the second week of April, **commodity carton** growers are looking into transition mid-April, and **processors** growers/shippers are looking to transition late April and early May. It could be delayed a week or two. **Limes** are transitioning now through April, elevated prices and lower quality are expected. **Grapes** and **melons** are expecting to transition in May from imports to domestic. **Baby arugula** are being prorated by some growers with fair quality. Extreme alert for **Broccolini** due to weather and will be unstable for a few weeks.

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## From fresh berries to lettuce, what we now know about potential California crop losses from flooding

By **TYNE MORGAN** March 17, 2023

California farmers are facing another round of flooding, with fields still bearing fresh scars from January's flood event. An area known for the production of fresh berries, as well as leafy greens, is bracing for the worst, and officials expect the March flooding to spread over more acres than January.

The Monterey County Ag Commissioner's office conducted an assessment of the January floods, which projected the flood waters covered 20,000 acres in Monterey County, which is home to the Salinas Valley. The losses were pegged at \$330 million, and that was at a time when the majority of the spring crops hadn't been planted yet.

"Now we have March flooding, so those farms adjacent to the Salinas River, and in other low lying areas, which are at most risk for flooding again, I think the difference this time is kind of two-fold," says Chris Valadez, the president of the Grower-Shipper Association of Central California. "One, you had crops planted in the ground for the upcoming spring harvest. So, there is direct crop damage this time more so than there was and would have been in the January event, and two, not only did you know virtually all of the 20,000 or so acres, flood again, but this weather system and the resulting flood and volume of water that was coming down the Salinas River and spilled over laterally into farm fields was more aggressive."

This week, the atmospheric rivers are having a larger cut due to a levee breach. The water is impacting fields planted in fresh berries, like strawberries and raspberries. Some of the low-lying area are also home to leafy green production like lettuce. While the damage will be severe for those in the flood water's path, Valadez says the entire area includes close to 360,000 acres of productive farmland, most of which is expected to still be harvested this year.

"There are an array of different row crops, vegetables, and others that that are planted in that will be harvested and shipped come this spring. That is just kind of the good news, if there's any to share from this event," he says. "The bad news is there's more acreage there's going to be more direct crop loss, there's going to be more negative impact onto the agricultural economy, families and farm workers....."

[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 [dforsythe@nproduce.com](mailto: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!

Your Dedicated NPC FB, LLC Staff