

MARKET OUTLOOK



Apples



SUPPLY
FAIR
QUALITY
GOOD

According to a January report from USApple, apple holdings are down 4.1% from previous time period. Total volume of bushes reported on January 1 was 84.2 Mil, which is 12.5% less than the January 5-year average. Report showed Washington continue to produce the most, with 91.9 Mil bushels (42 lbs) during 2022–23 follow by Michigan with 9.9 Mil bushels. Washington production has dropped by 7.3 Mil bushels year-on-year. The production this year is 17.1 Mil bushels lower than the January 5-year average. Gala had the largest production at 21.1 Mil bushels, followed by Red Delicious with 15.8 Mil and Fuji at 12.8 Mil bushels. Per the USDA's projection, follow by back to back years of volume decreased, the U.S. is projected to increase production by 158,000 tons to 4.5 Mil in 2022-23. Despite higher supplies, exports are expected to fall 53,000 to 670,000 tons, marking the third consecutive year of decline on reduced Washington output. With higher shipments from New Zealand, imports are anticipated to increase by 10,000 to 115,000 tons.

MARKET ALERT

Arugula



SUPPLY
FAIR
QUALITY
FAIR

ALERT (Baby) Supplies are improving. Quality is fair. Market pricing is steady. Growers will be transitioning back to Salinas next week. Supplies are limited due the recent floods in Salinas. Growers are expecting limited supplies for the next few weeks. (F.O.B pricing for this week \$8.50 - \$9.45)

Asparagus



SUPPLY
GOOD
QUALITY
GOOD

Mexico production is finishing up and only had a few fields remaining. Anticipate short supply over the next 2-3 weeks while Mexico transitions to new growing regions and Peru starts with full production. Would recommend being flexible with subbing with Medium or Xlg just so orders are not shorted. Market is active.

Avocados



SUPPLY
GOOD
QUALITY
GOOD

Volumes were light last week, as expected, due to Holy Week and a few scheduled harvest days. Fruit is ripening faster; thus, it is critical to maintain a cold chain and store at 38°F. Cinco promotional pulls are now available in all sizes, with the best deals on larger fruit. The California harvest is in full swing this week, with volumes expected to more than double from the previous week. The California Avocado Commission has provided new projection estimates, and despite the late-winter storms, the total crop estimate remains stable. With the late start, the projected 243 million pounds have a revised distribution, and large volumes are expected for May to July. Peru expects this season's volume to the US to increase, and the season is anticipated to last later into the fall. As the industry ramps up for the second-largest avocado consumption day of the year and anticipates a stronger market in the lead-up to Cinco de Mayo, demand for fruit in the field is growing.

Bananas



SUPPLY
GOOD
QUALITY
GOOD

Banana volume continues to be stable. Recommend reaching out if there's any issue with ripening prior to delivery.

MARKET OUTLOOK



Beans



SUPPLY
GOOD
QUALITY
GOOD

Green Beans: Supply and quality are both good. Beans will transition between growing regions in the East and West in May and market is expected to increase during that time.

Snow Peas: Guatemala production is light due to nighttime rain in Guatemala. Volume is down, but not out. Mexican supply is steady.

MARKET ALERT

Berries



SUPPLY
FAIR
QUALITY
FAIR

Blackberries: Prices for Blackberries are trending up with fair quality. Production out of Mexico is approaching their seasonal low. California is forecasted to come online during the second week of June. Production out of the Southeast is expected to start in 2 to 3 weeks.

Blueberries: Prices for Blueberries are trending slightly down. Prices remain elevated. Production is picking up out of Florida. Georgia's production will start soon. Production out of Mexico is coming off their peak and volume is expected to come down weekly.

Raspberries: Prices for Raspberries are trending up. Production out of Mexico is approaching their seasonal low. California is forecasted to come online during the second week of June.

MARKET ALERT

Broccoli



SUPPLY
LIMITED
QUALITY
FAIR

Broccoli: **ALERT** Supplies will be very limited. Demand continues to be strong. Market pricing continues to escalate. Supplies coming from Salinas, Santa Maria and Mexico. For the next few weeks, supplies are expected to be limited during the transition from Yuma to Salinas. (F.O.B pricing for this week \$48.00 - \$49.00)

Broccolini: **EXTREME** Supplies continue to be very limited. Demand exceeds supplies. Growers continue to pro-rate orders. Market is expected to remain unstable for another couple of weeks due to the transition back to Salinas. (F.O.B. pricing for this week \$30.45 - \$32.65)

MARKET ALERT

Brussels Sprouts



SUPPLY
FAIR
QUALITY
FAIR

Supplies are light. Quality is good. Demand continues to be steady. Volume from Mexico is winding down as growers are transitioning to Salinas. Market pricing is expected to escalate in the next few weeks. (F.O.B pricing for this week \$28.85 - \$30.45)

Cabbages



SUPPLY
GOOD
QUALITY
GOOD

Supplies are improving with better availability. Market pricing has improved. Prices are expected to be steady. Supplies are coming from Yuma and Imperial Valley. (F.O.B pricing for this week \$12.55 - \$16.45)

MARKET OUTLOOK

Cantaloupes



SUPPLY
GOOD
QUALITY
GOOD

Cantaloupe supply is strong, while size continues to peak on 5J/6Js, which accounts for more than 50% of total production. 12/15s are even more limited while 9/9Js have some availability. The excessive in sizing is being caused by the extremely hot and dry weather in Guatemala. Anticipating seeing a little swing to more normal sizing with the arrivals of mostly 9/12s next week. Strong retail ads continue to run past the Easter holiday. The weather starts to warm up, creating ideal promotional opportunities. High brix levels (13-16%) contribute to melons being heavier.

Carrots



SUPPLY
GOOD
QUALITY
GOOD

RADAR Rains in California could make things more difficult in the carrot region. Although there has been no immediate damage, plants due to be harvested in the next 2-4 months may be affected, but it is yet too early to tell. A late summer/early fall crop is causing concern. The rain has delayed harvesting, and if it continues, the supply may be jeopardized. Some crops are transitioning to the desert this weekend, which will be a crucial deciding factor in how the season goes.

MARKET ALERT

Cauliflower



SUPPLY
SHORT
QUALITY
FAIR

EXTREME Supplies continue to be extremely limited. Market pricing is escalated. Supplies are coming from Salinas, Santa Maria, and Mexico. Supplies are expected to be extremely limited due to the transition from Yuma to Salinas. Market pricing is expected to be escalated for a few weeks. (F.O.B pricing for this week \$57.00 - \$59.00)

Celery



SUPPLY
GOOD
QUALITY
GOOD

Supplies continues to be good with fair quality. Supplies are coming from Oxnard and Yuma. Yuma is winding down, moving to Santa Maria and Oxnard region. Demand is very good. Market pricing is steady going into next week. Supplies are expected to remain steady for the next few weeks. (F.O.B pricing for this week \$11.00 - \$13.00)

MARKET ALERT

Citrus



SUPPLY
GOOD
QUALITY
GOOD

Limes: RADAR As availability increases, the market is beginning to de-escalate, more quickly on small fruit. Recent rain events have aided fruit development and color, but they may also result in conditioned flaws such as styler-end breakdown and oil spots, which can appear days after initial transport. This happens more often with large size. Small fruit is still peaking, accounting for 60% of total yields while large fruit will remain scarce for the foreseeable future. Expect a big price gap between small and large sizes if the market potentially descends. Peru and Columbia continue to export to capitalize on the elevated market and cover Mexico's supply gap. We will see more offshore fruit at ports of entry on the East Coast and in South Florida. Due to pricing benefits based on delivery location, demand is elevated, especially for large sizes.

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

FAIR

QUALITY

FAIR

Prices for Bi and Yellow Corn are trending up. The market tightened up around the Easter holiday. Growers expect the market to settle down a bit as demands return to normal levels going forward. Corn production out of the West has transitioned to Brawley.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Slicing, English and Persian Cucumbers are trending down. Florida is experiencing rain and high temperatures. Production out of Mexico remain at good levels.

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

Reds and greens imports have been slightly lighter than originally forecasted, but volume continues to increase week by week hitting their peak in Easter.

Herbs



SUPPLY

GOOD

QUALITY

GOOD

East coast production is still somewhat limited due to weather issues in Colombia. **Rosemary** seems to be the herb most affected. West coast production is improving, but still not at 100% production. **Chervil** will continue to be limited at both location for the next 2-3 weeks.

Cilantro: Supplies are light with fair quality. Market pricing is expected to increase as growers finish up in Yuma. Most growers are now shipping out of Oxnard and Santa Maria. Expect supplies to be light for the next few weeks due to the transition to Santa Maria and Salinas. (F.O.B price for this week \$18.75 - \$20.45)

MARKET OUTLOOK

Honeydews



SUPPLY

FAIR

QUALITY

GOOD

Honeydew production has suddenly experienced a considerable reduction in arrivals this week. What is arriving is peaking at 4Js, leaving 6/8s in a demand-over-supply dilemma. Due to limited availability, size flexibility may be necessary this week. Expect production to increase again next week, reaching peak levels for the season, with sizing primarily 5/6s, so the current drop-off is only temporary.

MARKET ALERT

Iceberg



SUPPLY

SHORT

QUALITY

FAIR

EXTREME Supplies continues to be very limited. Quality is fair. Weights continue to be down with smaller heads. Growers are expecting supplies to be limited for the next few weeks as they transition back to Salinas and Huron. Some growers have finished harvesting in Yuma and have moved to Huron. Salinas is delayed due to the rain and cold temperatures. Expect escalated markets for the next few weeks. (F.O.B pricing for this week \$49.50 - \$51.50)

Kale



SUPPLY

FAIR

QUALITY

GOOD

Supplies are steady. Demand continues to be very good. Quality is good. Supplies should remain steady for a few weeks. Market pricing is steady. (F.O.B pricing for this week \$14.65 - \$16.45)

MARKET ALERT

Leaf



SUPPLY

LIMITED

QUALITY

FAIR

Green & Red Leaf: Supplies will be very limited. Quality is fair. Expect to see fringe burn and smaller heads. Market price has increased as growers are finishing up in Yuma and transition to Salinas. Expect escalated markets for the next few weeks. (Green Leaf F.O.B. pricing for this week \$25.00 - \$27.00)(Red Leaf F.O.B. pricing for this week \$27.00 - \$29.00)

Romaine: Supplies continue to be limited with fair quality. Expect to see fringe burn and smaller heads. Some growers are finished in Yuma and have transitioned to Salinas. Expect market pricing to be escalated for the next few weeks. Supplies will remain a challenge for the next few weeks during the transition from Yuma to Salinas. (Romaine F.O.B pricing for this week \$25.00 - \$26.00)(Hearts F.O.B pricing for this week \$27.65 - \$31.25)

Tender Leaf: Supplies have improved. Demand continues to be good. Quality is fair. Market pricing is steady. Growers have finished in Yuma and have transitioned to Salinas. Some tender leaf crops have been delayed due to the recent floods and cold temperatures in Salinas. (F.O.B pricing for this week \$4.75 - \$5.50)

MARKET OUTLOOK

MARKET ALERT

Mushrooms



SUPPLY

FAIR

QUALITY

GOOD

The mushroom industry continues with a shortage of labor, as well as cost inflation increases in raw materials. Specifically corrugated cardboard and packaging materials. Expect for Mushroom pricing to remain strong.

Shitake: Shitake mushroom supplies will be short due to an uncontrollable rise in the cost of imported Shitake logs from China. Shitake mushrooms supplies will be short, prices will be changing almost weekly. Increase pricing in raw materials is also causing price increases.

Onions



SUPPLY

GOOD

QUALITY

GOOD

Onions are coming out of Idaho, North Dakota, Oregon, Texas, and Washington. Demand is good. Quality is good. Market is steady but anticipating an increase soon. Washington will be wrapping up at the end of April. Imperial Valley is starting soon. Texas has slowed down due to the rain which is causing a short supply. Some growers are already done with their crops in Rio Grande due to all the rain. Eagle Pass is expected to start in May. All colors available. Vidalia are expecting to start next week. Planting for next season crops in the west continued to be delayed due to cold and rainy weather. This will also have an impact on precut.

Onions Green



SUPPLY

GOOD

QUALITY

GOOD

Supplies continue to be steady. Market pricing is back to normal. Supplies are coming from Mexico. Past cold temperatures slowed down the supplies. Current supplies are expected to continue improving for the next few weeks. (F.O.B pricing for this week \$9.75 - \$11.45)

MARKET ALERT

Peppers Bell



SUPPLY

GOOD

QUALITY

GOOD

Prices for Green, Red and Yellow Bell Peppers are trending down. Florida is experiencing rain and high temperatures. Planting in California is delayed due to rain.

MARKET ALERT

Peppers Chili



SUPPLY

GOOD

QUALITY

GOOD

ALERT (Anaheim) Prices for Chili Peppers are mostly trending up. Growers are reporting that the Jalapeno and Anaheim pepper market is tightening up. Growers are forecasting that central Florida will come online in a few weeks.

MARKET OUTLOOK

MARKET ALERT

Pineapples



SUPPLY

GOOD

QUALITY

GOOD

The industry's shortage of pineapples is caused by several factors. The primary one, though, has been Eastern demand. A 140% increase over usual caused supply problems since the pipeline was not ready for such a large increase. Being accommodated with sizes will help shippers fulfill every order to the best of their ability. The good news is that the week-to-week pipeline will resume its smooth flushing and this issue will no longer be present. Several prorates are already starting.

Potatoes



SUPPLY

FAIR

QUALITY

GOOD

Packers are slightly reducing their output to start stretching their supplies to cover any potential delays in reaching the new crop. This has moved the market up slightly as demand is still good. Planting for next season has been delayed due to the cold temperatures and snow in the growing regions. This will affect the precut as well.

Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Yellow and Zucchini Squash are trending down. Supplies out of Florida are tightening as production transition from South to Central Florida. Mexico is expecting to see volumes pick up in the next week or two.

MARKET ALERT

Strawberries



SUPPLY

FAIR

QUALITY

POOR

Prices for Strawberries are mostly stable. With Florida and Texas out of the picture, the pressure is on California and Baja. The weather in California has improved. They will see volumes increase going forward. Growers are reporting that supplies for the Mother's Day holiday are expected to be good.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

Prices for 25 lb Round, Grape, and Roma Tomatoes are trending up. Prices for 20 lb Round and Cherry Tomatoes are stable. Tomatoes currently remain a great value. Growers out of Florida and Mexico are reporting good quality and volumes. The weather in all growing areas has been very good. Prices are near the bottom.

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Supplies are good on large fruit but minis remain a little tight in all areas as offshores are winding down. Small seedless watermelons are tight. The volume out East and Florida are good. Mexican melons are shipping out of Edinburg and Nogales. Out West, the volume is expected to pick up at the end of April.



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, lower quality, and short supplies 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. **Broccoli** will be limited due to the transition. Extreme alert for **Broccolini** due to weather and will be unstable for a few weeks. Extreme alert for **Iceberg** and **Cauliflower** due to the transition; supplies will be limited.

Berries and veggies shine in Santa Maria district

By **TOM KARST** April 6, 2023

USDA-reported truck shipments show berries and lettuces are the big movers in California's central coast Santa Maria district.

The combined crops of the region found higher prices last year. The USDA reported that the average price for all California central coast fresh produce items was \$18.28 per carton in 2022, up from an average of \$14.99 per carton in 2021 and up from \$15.42 per carton in 2020.

SANTA MARIA VOLUMES

Berry shipments were reported in the millions of flats for 2022, with shipments reported every month.

Santa Maria district conventional strawberry truck shipments totaled 70.7 million cartons in 2022, compared with organic strawberry shipments from the district of 8.2 million cartons, the USDA reported.

Conventional blackberry shipments from Santa Maria in 2022 totaled 3.3 million flats of 12 6-ounce cups, according to the USDA. Blackberry shipments were reported from Santa Maria for every month of 2022, with peak shipments in August, September and October, according to the USDA.

Organic blackberry shipments in 2022 were reported at 1.4 million cartons of 12 6-ounce cups.

Santa Maria district truck shipments of conventional raspberries in 2022 totaled 1.6 million cartons, compared with organic raspberry shipments of 63,575 cartons, the USDA said.

LETTUCE AND VEGGIES MIX

Iceberg and romaine lettuce topped production charts in Santa Maria in 2022.

Here are other crops reporting Santa Maria truck shipments in 2022:

- Conventional iceberg lettuce tallied 4.32 million cartons, with 9,429 cartons of organic iceberg lettuce reported.
- Conventional romaine lettuce totaled 1.35 million 40-pound cartons, compared with organic romaine shipments of 9,332 cartons.
- Conventional romaine hearts totaled 3.2 million cartons, compared with 326,999 cartons of organic romaine celery hearts.
- Boston conventional lettuce totaled 16,902 cartons, compared with 695,369 cartons of conventional ...

[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 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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