



WEEK 15: April 10 - April 16, 2023
MARKET OUTLOOK

Transportation:

National Diesel Average: \$4.105

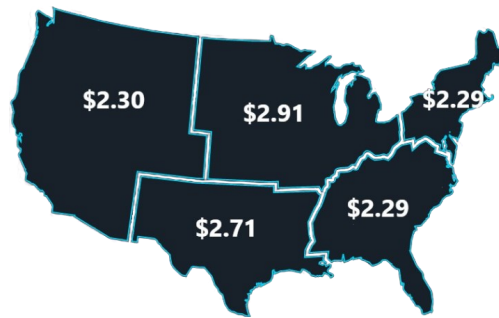
Compared to Last Year: \$3.066

National Fuel Surcharge: \$0.55

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

National Posted Rate per mile

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



Regional Weather Update:

Oxnard, CA: Sunny and cloudy skies throughout the week with highs in the 60s and lows in the 40s to 50s.

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

Yuma, AZ: Sunny skies with highs in the 70s to 90s and lows in the 50s and 60s.

Immokalee, FL: Thunderstorms and showers throughout the week with highs in the 80s and lows in the 60s.

Idaho Falls, ID: Sunny and cloudy skies throughout the week with highs in the 40s to 60s and lows in the 30s.

MARKET ALERT

- Arugula Baby
- Berries: Blackberries, Blueberries & Brussels Sprouts
- Strawberries
- Broccoli
- Broccoli (Extreme)
- Carrots (Radar)
- Cauliflowers (Extreme)
- Herbs: Chervil & Rosemary
- Lettuces: Iceberg (Extreme) & Tender Leaf
- Limes
- Mushrooms

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
FAIR
QUALITY
FAIR

ALERT (Baby) Supplies are limited. Quality is fair. Market pricing is steady. Growers will be transitioning back to Salinas next week. Growers are reporting limited availability 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 declining, whereas Peruvian production is beginning to increase. The production gap could be 2-3 weeks, resulting in a dip in supplies, particularly for the Large size. Anticipate lower 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.

Avocados



SUPPLY
GOOD
QUALITY
GOOD

Avocado demand in the United States remains high and stable. Following a lower-than-expected harvest in past weeks, growers in Mexico increased field costs and the healthy US demand have kept the field prices up, with some two-tiered pricing on less demanded sizes. Because of their higher oil content, Mexican avocados have a rich and excellent flavor profile. Fruit is ripening faster; thus, it is critical to maintain a cold chain and store at 38°F. California season has begun and is expected to yield more than 1 Mil. lbs. per week. Mexico will continue to feed the pipeline and demands in the US through April, until California is fully ramped up and Peruvian and Colombian avocado arrive.

Bananas



SUPPLY
GOOD
QUALITY
GOOD

Banana volume continues to be stable.

MARKET OUTLOOK



Beans



SUPPLY
GOOD
QUALITY
GOOD

Green Beans: Supply and quality are both excellent. No supply issue expected unless Mother Nature says otherwise.

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: **ALERT** Prices for Blackberries are trending up. Production out of Mexico is approaching their seasonal low. California is forecasted to start during second week of June.

Blueberries: **ALERT** Prices for Blueberries are trending up. Market is expected to remain tight for the next few weeks. Production out of Mexico is coming off their peak and volume is expected to come down weekly. Production out of California, Georgia and Florida will ramp up in the weeks to come which will help take some pressure off the markets. Quality is Good.

Raspberries: Prices for Raspberries are trending up. Production out of Mexico is approaching their seasonal low. California is forecasted to start during second week of June. Quality and volume are both good.

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 are winding down fast in Yuma. Salinas growing area is behind about a week. There is product available from Santa Maria and Mexico. For the next few weeks, expect supplies to be limited during the transition from Yuma to Salinas. (F.O.B pricing for this week \$33.00 - \$34.00)

Brocolini: **EXTREME** Supplies continue to be very limited. Demand exceeds supplies. Growers continues to pro-rate orders. Market is expected to remain unstable for another couple of due to the transition from Salinas to Yuma. (F.O.B. pricing for this week \$32.45 - \$34.75)

MARKET ALERT

Brussels Sprouts



SUPPLY
FAIR
QUALITY
GOOD

Supplies is steady. Quality is good. Demand continues to be steady. Volume from Mexico is winding down as growers are transitioning to Salinas. (F.O.B pricing for this week \$26.85 - \$28.55)

Cabbages



SUPPLY
GOOD
QUALITY
GOOD

Supplies are much better. Growers are reporting better availability. Market pricing has also improved. Prices will not be escalated for next week. Product is coming from Yuma and Imperial Valley. (F.O.B pricing for this week \$12.55 - \$16.45)

MARKET OUTLOOK

Cantaloupes



SUPPLY
FAIR
QUALITY
GOOD

Cantaloupe production is peaking on 5J/6Js, resulting in a two-tier market where smaller fruit is considerably more limited. For the next several weeks, there will be very excellent retail business on 9/9Js and 12s. Future production sizing trends appear to be more normal, with mostly 9/12s projected, which is more favorable to regular business. Quality has been excellent. Brix level is 13%-15%.

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
GOOD

EXTREME Supplies are extremely limited. Market pricing has escalated. Supplies are winding down fast in Yuma. Salinas growing region is behind about a week. Cold Weather and heavy rains have affect this market. Supplies are expecting to be extremely limited due to the transition from Yuma to Salinas. Markets pricing is expected to be escalated for the next few weeks. (F.O.B pricing for this week 44.85 - \$45.65)

Celery



SUPPLY
GOOD
QUALITY
GOOD

Supplies will be good. Some growers are reporting quality as fair. Supplies are currently coming from Oxnard and Yuma. Yuma is winding down, moving to Santa Maria and Oxnard region. Very good demand for celery. Market pricing has improved going into next week. Supplies are expected to remain steady for the next few weeks. (F.O.B pricing for this week \$11.80 - \$13.70)

MARKET ALERT

Citrus



SUPPLY
GOOD
QUALITY
GOOD

Limes: ALERT Prices are steadily rising as Mexico's supply situation gets more problematic. Crossings have dropped significantly, and yields are mostly small fruit. Large sizes will continue to be limited. Availability is likely to decrease until mid-April, adding further upward pressure on market pricing. Supply will be short. This week's rain will help with overall fruit health and sizing in the growing region. 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

FAIR

QUALITY

FAIR

Prices for Corn are trending up. Demands are strong going into the Easter Holiday. Production out of Mexico is winding down. California is expected to start production out of Brawley next week.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Slicing, English and Persian Cucumbers are trending down. Growers are reporting good volumes out of the East and West. Markets are expected to remain steady for the next 2-3 weeks.

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 and quality have improved. Market pricing has improved. Most growers are now shipping out of Oxnard and Santa Maria. Expect supplies to be light the next few weeks due to the transition to Santa Maria and Salinas. (F.O.B price for this week \$14.55 - \$16.45)

MARKET OUTLOOK

Honeydews



SUPPLY

FAIR

QUALITY

GOOD

Honeydew sizing are shifting towards the larger sizes, with 6/8s fetching a premium. External appearance has been clean with solid internal quality with good brix. Brix levels is 12%-14%.

MARKET ALERT

Iceberg



SUPPLY

SHORT

QUALITY

FAIR

EXTREME Supplies will be very limited going into next week. Quality is reported as only fair. Weights are also down this week due to 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 finalized harvest in Yuma and have moved to Huron. Salinas region is delayed about two weeks due to the rains and cold temperatures. (F.O.B pricing for this week \$28.65 - \$29.85)

Kale



SUPPLY

FAIR

QUALITY

GOOD

Supplies are steady. Demand continues to be very goody. 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)

Leaf



SUPPLY

GOOD

QUALITY

FAIR

Green & Red Leaf: Supplies will be steady for this week. Quality is reported as only fair. Expect to see fringe burn, and some wind damage. Expect for market price increases as growers transition to Salinas next week. Current harvest is coming from Imperial Valley, and Yuma. (Green Leaf F.O.B. pricing for this week 18.85 - \$14.50)(Red Leaf F.O.B. pricing for this week \$14.85 - \$15.45)

Romaine: Supplies are limited. Growers are reporting fair quality. Expect to find occasional blistering and epidermal peel. Growers are winding down in Yuma. Some growers will start transitioning back to Salinas next week. Expect market pricing to be escalated the next few weeks. Due to the transition from Yuma to Salinas, the supplies will be challenging for the next few weeks. (Romaine F.O.B pricing for this week \$16.75 - \$18.95)(Hearts F.O.B pricing for this week \$19.70 - \$21.25)

Tender Leaf: ALERT Supplies will be light for the next few weeks. Demand continues to be good. Quality is fair. Market pricing is steady. Growers continue harvesting in Yuma. Some growers will start transitioning next week to Salinas. Some tender leaf crops have been delayed by ten days due to the recent floods 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 shipping out of Idaho, Oregon, Texas, and Washington. Demand is up. Quality is good. Market is steady but expected to be volatile in late April. Northwest is finishing up their season. Washington will be wrapping up at the end of April. Imperial Valley is expected to start mid-April. Texas has slowed down due to the rain. All colors available. Vidalia are expecting to start mid-April. 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. Green onions are coming from Mexico. Past cold temperatures slowed down the supplies. Current supplies are expected to continue improving the next few weeks. (F.O.B pricing for this week \$10.50 - \$11.00)

Peppers Bell



SUPPLY

GOOD

QUALITY

GOOD

Prices for Green, Red and Yellow Bell Peppers are trending down. Good volumes out California and Florida are holding down the markets. Growers are expecting steady supplies for the next few weeks.

Peppers Chili



SUPPLY

GOOD

QUALITY

GOOD

Prices for Chili Peppers are trending down. Production is coming out of South Florida and Mexico. Growers are forecasting that central Florida will come online in a few weeks.

MARKET OUTLOOK

Pineapples



SUPPLY

GOOD

QUALITY

GOOD

Pineapples are tight and will remain so until April. 7/8ct Pineapples are slightly more available.

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.

Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Yellow & Zucchini Squash are trending down. Volumes out East and West coast are good. Markets are expected to remain stable for the next 2-3 weeks.

MARKET ALERT

Strawberries



SUPPLY

FAIR

QUALITY

POOR

Prices for Strawberries are trending significantly up. Growers are reporting tighter supplies due to rains in California plus seasons ending out of Florida and Mexico. Production areas out of Oxnard, Santa Maria is drying out allowing growers to clean up the fields. Watsonville and Salinas were impacted the most by rain. It will take a while longer to get them back online.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

Prices for Tomatoes are trending down. Prices are at or near the bottom, so they are a great value. Volumes are good out of Florida and Mexico. Growers expect the market to tighten up during the last weeks of April.

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Production our East is improving. Watermelons continue to be tight out West. Seedless are shipping from Mexico while mini are out of Edinburg and Nogales. Quality has been good. Some growers have started harvesting in Florida. 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, 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 **Brocolini** 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.

Avocado industry ramps up for its second-biggest day

By **AMY SOWDER** April 6, 2023

No other holiday celebrated in the U.S. is bigger for the avocado industry than Cinco de Mayo — besides the Super Bowl, which many Americans consider an unofficial holiday.

Leading up to Cinco de Mayo, shoppers spend 1.9 times more on groceries when avocados are in the basket, according to a Numerator Basket Affinity Report that studied sales from April 7 to May 4, 2022.

"Cinco de Mayo is the second-biggest consumption occasion in the U.S. for avocados and guacamole, and it represents a key opportunity for us to engage with shoppers," said Stephanie Bazan, senior vice president of commercial strategy and execution at Avocados From Mexico, a nonprofit avocado marketing organization based in Irving, Texas.

Avocado demand

The U.S. is one of the biggest consumers of avocados in the world, with annual per capita consumption surpassing 9 pounds, representing three times the European consumption, according to a May 20 ProducePay report.

Avocados from Peru aren't available in the U.S. until June, but avocados from Mexico and from California are ripe and ready for May 5 parties and gatherings.

Partly due to increases in demand and California's weather issues, Mexican avocado imports dominate the U.S. avocado market, with a historical maximum of 2.4 million tons in 2021, which is about 87.7% of total avocado imports to the U.S., ProducePay said in the report.

Cinco de Mayo is really called Battle of Puebla Day, like how the Fourth of July has almost overtaken the holiday name of Independence Day.

This May 5 celebration is a relatively minor holiday in Mexico. But in the U.S., Cinco de Mayo has evolved into a commemoration of Mexican culture and heritage, particularly in areas with large Mexican-American populations. It's the anniversary of Mexico's victory over the Second French Empire at the Battle of Puebla in 1862, led by General Ignacio Zaragoza. The victory over the French army was a morale boost for the Mexicans.

The holiday is often celebrated with Mexican handheld foods, such as tacos, burritos and quesadillas, Bazan said.

Retailer resources

"Cinco de Mayo is on a Friday this year, and we're working with retailers to make it a big success..."

[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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