



WEEK 23: June 5 - June 11, 2023
MARKET OUTLOOK

Transportation:

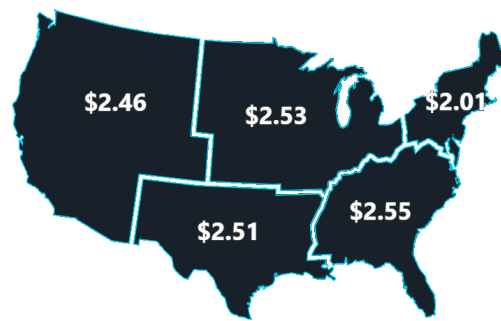
National Diesel Average: \$3.855

Compared to Last Year: \$2.171

National Fuel Surcharge: \$0.50

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

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



Regional Weather Update:

Oxnard, CA: Cloudy skies with highs in the upper 60s and lows in the 50s.

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

Yuma, AZ: Sunny and partly cloudy skies with highs in the upper 90s and lows in the 60s.

Immokalee, FL: Thunderstorms and partly cloudy skies 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 low 50s with PM thunderstorms on Wednesday.

MARKET ALERT

- Berries: Blueberries & Raspberries**
- Brussels Sprouts (Extreme)**
- Celery (Extreme)**
- Grapes**
- Melons (Radar): Cantaloupe & Honeydew**
- Onions (Radar)**
- Pepper Chili: Anaheim, Poblano & Serrano**
- Pineapples (Radar)**
- Potatoes**
- Snow Peas (Radar)**
- Tomatoes**

A banner image showing baskets of fresh produce including green beans, potatoes, and cherry tomatoes on a wooden surface.

MARKET OUTLOOK

Apples



SUPPLY

GOOD

QUALITY

GOOD

The Washington State Apple Crop is in the final 3 to 4 months left of shipping. The 2022/23 crop will finish slightly more than 100 Mil boxes, which is much less than the 122 Mil boxes finished in 2022. Due to a shortage of availability, weekly shipments have been much lower than usual. Top 5 Apples for Foodservice: **Red Delicious**, for instance, has 1.5 Mil fewer boxes than it did at the same time last year. Peak sizes are 113s and 125s, with 88s and larger still maintaining higher prices. Quality is good. **Gold Delicious** has 220,000 fewer boxes than last year. Quality at the end of the year has been excellent. **Granny Smith** has 2.6 Mil fewer boxes than at this time last year. They have been scarce this season, and costs have been higher than usual. Quality has been good all year, and as the state enters the summer months, the quality will continue to get better. **Gala** is the only variety with 1.1 Mil more than this time last year. Making it to the New Crop Galas this year will not be a problem. **Fujis** is roughly the same as this time last year. Quality has been good. New Crop Washington State apples will be delay 1-2 weeks later than previous season due to the late bloom caused by the cold weather in spring. The new crop estimate has not been sent out to the industry, but rumor has it in the 122 Mil range.

Asparagus



SUPPLY

GOOD

QUALITY

FAIR

Peru production is steady with fair quality. California is finishing up. Michigan and Canada continue to have good supplies with excellent quality. Washington State is wrapping up due to seasonality. Baja continues to improved. Market is trending down as volume continue to increase from all growing regions.

Avocados



SUPPLY

GOOD

QUALITY

GOOD

Mexico and California will drive the avocado market in the US for several months. Peruvian fruit is primarily distributed at retail, but it contributes to the entire market's stability. Soon, there will be a mix of fruit flowers between Marcena and Flor Loca. Recommend not to determine the fruit maturity based on skin color but to do a manual rotation selection by gently pressuring the avocado to feel how much is giving and pick the ones that are more advanced for use that day. While the late-season fruit harvest at higher elevations produced large sizes and grade 2 fruit, summer crops, which are harvested at lower elevations, often had a size curve dominated by 60s and smaller. Avocados from Colombia are well received, and this fruit has been gaining ground in the US market. Columbian avocado are expecting to arrive the second week of June and go through the summer.

Bananas



SUPPLY

GOOD

QUALITY

GOOD

Bananas are currently solid and consistent.

MARKET OUTLOOK



Beans



SUPPLY
FAIR
QUALITY
GOOD

Green Beans: Supplies are coming from Northern Florida and Georgia. Quality is good. Overall supply is good with the market back to normal on the East coast. Mexico production continues to be light during the transition. Expecting improvement by mid-June.

Snow Peas: **RADAR** Offshore supplies has been affected by the rain on for the East coast. Market is trending up. California production is steady. Peruvian has light supply.

MARKET ALERT

Berries



SUPPLY
GOOD
QUALITY
FAIR

Blackberries: Prices for Blackberries are trending down. Production out of Mexico is tightening up due to high temperatures and quality issues. Harvesting is starting up out of Watsonville this week. Production out of the Southeast is slowly picking up.

Blueberries: **ALERT** Prices for Blueberries are trending up. Production is coming out of Mexico, California, the Pacific Northeast, Georgia, and North Carolina. Volume is still on the lower end of the spectrum. Look for tight supplies for another week or two.

Raspberries: **ALERT** Prices for Raspberries are trending down. Prices remain elevated and supplies are tight out of Mexico due to high temperatures. Harvesting is starting up out of Watsonville this week.

Broccoli



SUPPLY
GOOD
QUALITY
GOOD

Broccoli: Supplies continue to be good. Good demand continues for Broccoli. Markets are not escalated at this time. Supplies are available from Salinas, Santa Maria, and Mexico. Supplies are expected to remain steady for the next few weeks. Great time to promote Broccoli. (F.O.B pricing for this week \$13.00 - \$14.00)

Broccolini: Supplies continue to be very good. Demand has slowed down. Supplies are expected to continue improving. Supplies should be steady for the next few weeks. Great time to promote Broccolini. (F.O.B pricing for this week \$21.95 - \$22.75)

MARKET ALERT

Brussels Sprouts



SUPPLY
LIMITED
QUALITY
FAIR

EXTREME Supplies continue to be extremely limited with only fair quality. Demand continues to remain steady. Supplies from Mexico are finishing up. Waiting for Central CA for better volume. Supplies are expected to be very limited the next few weeks. Market pricing and contracts will remain escalated. (F.O.B pricing for this week \$50.45 - \$52.65)

Cabbages



SUPPLY
GOOD
QUALITY
GOOD

Supplies are much better with good quality. Growers are reporting better availability. Market pricing has also improved. Product is coming from Salinas and Oxnard. (F.O.B pricing for this week \$14.00 - \$16.00)

MARKET OUTLOOK

Cantaloupes



SUPPLY
GOOD
QUALITY
GOOD

RADAR Domestic melons has started with light supplies in Arizona and Imperial Valley. Sizing is shifting to 9s followed by 12s. Volume is expected to increase in the next couple of weeks. Offshore remains light in supplies. Quality and brix has been good.

Carrots



SUPPLY
GOOD
QUALITY
GOOD

Past rains in California could have made some damage in the carrot regions. Plants due to be harvested in the next 1-3 months may be affected, but it is yet too early to tell. A late summer/early fall crop is a concern. Some crops have transitioned to the desert, which was crucial for a good supply.

Cauliflower



SUPPLY
GOOD
QUALITY
GOOD

Supplies are much better. Good demand continues for Cauliflower. Markets are not escalated at this time. Supplies are available from Salinas, Santa Maria, and Mexico. Supplies are expected to be good for the next few weeks. Great time to promote Cauliflower. (F.O.B pricing for this week \$10.85 - \$12.00)

MARKET ALERT

Celery



SUPPLY
LIMITED
QUALITY
FAIR

EXTREME Supplies will continue to be very limited. Quality is reported as only fair, seeder is present and disease pressure. Supplies are currently coming from Oxnard and Santa Maria. Very good demand continues for celery this week. Market pricing will be escalated for next week. Supplies are expected to be limited for the next 2-3 weeks. Waiting for the Salinas crop to start. (F.O.B pricing for this week \$50.00 - \$52.00)

Citrus



SUPPLY
GOOD
QUALITY
GOOD

Limes: While yields remain elevated, the market has stabilized. Recent rain events have aided fruit growth and color, but they may also result in conditioned flaws such as styler-end breakage and oil spots which can show days after initial shipment. The crop is peaking on small & mid-sized fruit although some operations are seeing a greater distribution of large sizes. European market is booming, which will eventually lead to a shift in Mexican exports. This will help to limit the number of US crossings. Pricing per size has nearly bottomed out and is likely to remain consistent for the next few weeks.

Lemons: Weather has been holding up. Shippers will try to stretch current supplies to the end of June. Some very late ranches in D1, but this year will end a little early. Fruit is sizing up. Rain has hurt pack-outs for many growers. Peaking on 115s. 140s Fancy are tight as this is the size/grades preferred by national retailers. Argentina will start in June.

Oranges: Navels are projecting to end mid-June. Brix is nice with an excellent color. Size is still small and will continue until the end of the Navel season. Peaking on 88s with very limited 48s/56s.



MARKET OUTLOOK

Corn



SUPPLY
GOOD
QUALITY
GOOD

Prices for Corn are trending down. Growers are reporting weak post-holiday demands. Supplies are available in California, Georgia, and Mexico. Growers out of California are reporting excellent quality.

Cucumbers



SUPPLY
GOOD
QUALITY
FAIR

Prices for Slicing & Persian Cucumbers are trending up. Prices for English Cucumbers are trending down. Production out of Florida and Mexico is declining for the season. Volume out of Georgia is expected to increase going forward. North Carolina and Baja is expected to start soon followed by New Jersey.

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
LIMITED
QUALITY
GOOD

Green grapes have begun to cross into Nogales, although availability is still limited after a long gap. It will take some time to refill the pipeline. Reds will soon follow, but the start date is unknown. Advise to avoid grapes as much as possible in order to prevent quality concerns and extreme market condition.

MARKET OUTLOOK

Herbs



SUPPLY
GOOD
QUALITY
GOOD

Herbs from Colombia continues to struggle due to the weather with short shelf life.

Chervil: **ALERT** Both imported and domestic production continues to be a struggle due to weather. Light supplies through the summer.

Cilantro: Supplies continue improving. Quality is also reported as improved. Market pricing has improved. Supplies are now shipping out of Salinas and Santa Maria. Improved weather will bring better supplies the next few weeks. (F.O.B pricing for this week \$14.00 - \$16.00)

Honeydews



SUPPLY
FAIR
QUALITY
GOOD

RADAR Mexican honeydew arriving through Nogales are a mix of 5/6s as the melon are transitioning to the northern region. Sugar and quality are good. Offshore melon are light as they are wrapping up. Domestic are expecting to start in the next week or two with very light production. Market is volatile. This will affect precut as well. Recommend being flexible with sizing for the next week or two.

Iceberg



SUPPLY
GOOD
QUALITY
GOOD

Supplies are much better with good quality. Weights and sizing on Iceberg have also improved. Supplies are expected to continue improving the next few weeks. Growers are expecting market pricing to remain steady the next few weeks. (F.O.B pricing for this week \$12.00 - \$13.00)

Kale



SUPPLY
GOOD
QUALITY
GOOD

Supplies are steady with very good demand. Good quality has been reported. Supplies should remain steady for a few weeks. Market pricing is steady. (F.O.B pricing for this week \$12.65 - \$14.45)

Leaf



SUPPLY
GOOD
QUALITY
GOOD

Green & Red Leaf: Supplies continue to be very good with good quality. Better quality this week on sizing and carton weights. Expect markets to remain steady the next few weeks. Growers are expecting steady supplies the next few weeks. (Green Leaf F.O.B pricing for this week \$9.00 - \$11.00)(Red Leaf F.O.B. pricing for this week \$9.00 - \$11.00)

Romaine: Supplies are very good with good quality. Weights are improving. Expect market pricing to remain steady for the next few weeks with steady supplies. Great time to promote Romaine and Romaine Hearts. (Romaine F.O.B pricing for this week \$11.00 - \$12.00)(Hearts F.O.B pricing for this week \$14.65 - \$16.80)

Tender Leaf: Supplies are very good with good quality. Demand continues to be good. Improved weather will bring better supplies and availability. Steady Market pricing and supplies are to be expected the next few weeks. (F.O.B pricing for this week \$4.75 - \$5.00)

MARKET OUTLOOK

Mushrooms



SUPPLY
FAIR
QUALITY
GOOD

Mushrooms supplies have improved in the last few months. Growers are reporting better availability across the mushroom category. Price increases seem to have stabilized. Markets are expected to remain steady for now.

Onions



SUPPLY
GOOD
QUALITY
GOOD

RADAR Quality is very good. Demand is good. Imperial Valley is wrapping up and San Joaquin is late coming in due to so much rain in the Fall. California will be gapping. Central Valley is expected to start in the next week. New Mexico is starting. Market pricing is trending up. This will also have an impact on precut.

Onions Green



SUPPLY
GOOD
QUALITY
GOOD

Supplies continue to be very good. Market pricing is back to normal. Green onions are coming from Mexico. Warmer weather will bring better supplies and availability. Market pricing are expected to be steady along with supplies for the next few weeks. (F.O.B pricing for this week \$8.00 - \$10.00)

Peppers Bell



SUPPLY
GOOD
QUALITY
GOOD

Prices for Green Bell Peppers are trending down. Prices for Red & Yellow Bell Peppers are trending up. Growers are reporting good volumes out of Georgia and California. Red and Yellow Bell peppers are expected to remain on the tighter side for another week or two.

MARKET ALERT

Peppers Chili



SUPPLY
FAIR
QUALITY
GOOD

ALERT (Anaheim, Poblano & Serrano) Prices for Chili Peppers are mostly trending up. Production is coming out of Georgia, and Mexico. Supplies remain very tight. Baja and California are expected to start production during the front end of June.

Pineapples



SUPPLY
FAIR
QUALITY
GOOD

RADAR The pipeline is yet to be back to normal. Demand exceeds supplies. Supply has not increased, and fruit availability is quite limited. Pineapples are beginning to shift from larger to smaller sizes in the coming weeks.

MARKET OUTLOOK

MARKET ALERT

Potatoes



SUPPLY
FAIR
QUALITY
GOOD

Some of the larger sizes are starting to become scarcer, which is driving up the market price. Overall demand exceeds supply slightly. Potatoes will shrink somewhat during storage due to water loss. Remaining supplies are Burbank, which typically have a smaller size profile than Norkotah, therefore, its anticipated that the remaining supplies will have a smaller size profile than those shipped earlier in the season. This indicates that, while there is still availability in the 40s to 60s, as the season progresses, there will be further pressure on the market. Growers were able to get into the field to evaluate the progress of the new crop after a couple of weeks delay due to the abnormal winter. They are reporting good soil temp which means the potatoes are coming up slightly faster than last year. Because of the delayed planting, there may be a gap in August between the old and new crops if we do not make up for lost time with better-than-average growing conditions. Overall, it seems to be a week or two weeks later than usual. This will also affect precut.

Squash



SUPPLY
GOOD
QUALITY
GOOD

Prices for Yellow and Zucchini Squash are trending up this week. Production is coming out of Central Florida, Georgia, North Carolina, and Mexico. Mexico is winding down for the season. California and Baja is starting to come into play.

Strawberries



SUPPLY
GOOD
QUALITY
GOOD

Prices for Strawberries are trending down. Growers are reporting that volumes are down a bit this week as expected post-holiday. Volumes out of Salinas and Watsonville is on the upswing due to good weather.

MARKET ALERT

Tomatoes



SUPPLY
FAIR
QUALITY
GOOD

Prices for all Tomatoes are trending down. Supplies remain tight. Production out of Quincy and South Carolina is slowly picking up. Production out of Tennessee and North Carolina is projected to start after the first of July. Volume out of Mexico is down as it transitions to new growing areas. Look for tighter supplies until the Eastern States get fully up and running. Many summertime local deals will start adding volume to the market as we go forward too.

Watermelons



SUPPLY
FAIR
QUALITY
GOOD

Supplies are good on large sizes excepts for small seedless are a bit tight. Georgia will start in a few weeks. Mexican melons are shipping out of Edinburg and Nogales. Mexico volume is expected to ramp up in a couple weeks. Texas production is ramping up. Arizona is expecting to start mid-June.



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. **Melons** have transition from imports to domestic but are limited in availability due to desert region starting late. **Grapes** are starting to cross but light and only greens are available with no confirmed start date for reds. Recommend to stay away from offering grapes at this time. Extreme alert for **Celery** as seeders and other quality issues continues to be challenged in production and expected to be very limited for a few weeks.

Produce on the brain: Stress, mental health and fresh produce

By **KRISTIN LEIGH LORE** May 30, 2023

If you're looking for a job where you can rest on your laurels and tune out, fresh produce might not be for you. By contrast, constantly chasing updates on pricing, availability and quality is considered normal in a fresh produce industry that includes seasonal and highly perishable products, as well as dynamic markets and slim profit margins.

While often complex and interesting, the produce industry can also be volatile and nerve-wracking at times. Successful produce leaders often spend much of their day swiftly adapting, communicating and deal making to maintain a business. The other end of the supply chain is no less stressful; agricultural workers tackle a nonstop productivity cycle of growing, harvesting, packing and transporting fresh fruits and vegetables as efficiently as possible.

THE STRESSFUL BUSINESS OF DELIVERING FRESH PRODUCE FROM SEED TO PLATE

In a recent LinkedIn Fresh Produce Industry Discussion Group survey, over 100 produce professionals described their stress level working in fresh produce. The responses underlined that while the sector is full of professionals who are navigating the stress, the industry still has room to improve.

While a quarter of fresh produce professionals surveyed said that the stress level in a typical week was "unsustainable" and even "toxic," 40% of those surveyed reported that, in their experience, the fresh produce industry was "never dull" and they "mostly enjoyed it." Another quarter of those surveyed reported that a week in fresh produce included an "about average" level of stress. Only 6% reported they are "living the dream."

"The produce industry is full of passionate and highly motivated individuals, and with that comes a certain amount of inherited stress and competition," Madelyn Edlin, marketing and sales manager for Equitable Food Initiative, told The Packer. "Those in this industry are some of the most humble and hardest working people I have ever met. However, that can result in a high-stress environment that is compounded by prolonged burnout and a sense of never being or doing quite enough,"

But, she added, to include a full picture of mental health in the fresh produce industry, you must start with understanding what farmworkers are experiencing and prioritizing their needs.

"It's imperative to remember the 2.5 million farmworkers who are the backbone of this industry. Without the incredible work they do, there are no cocktail hours, show floors, emails or Zoom calls," Edlin said. "Coming from politically and economically stressed environments, farmworkers are working to provide us with the highest-quality and safest food while fearing the impermanence of working under H-2A or without..."



Salinas Valley farmworkers (File image)

[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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