



WEEK 37: September 11 - September 17, 2023
MARKET OUTLOOK

Transportation:

National Diesel Average: \$4.492

Compared to Last Year: \$3.90

National Fuel Surcharge: \$0.52

Shortages: Seeing high freight rates, with **extreme** shortages - None; **slight** shortages - DE, MD & VA

Regional Weather Update:

Oxnard, CA: Partly cloudy with highs in the 70s and lows in the low 60s.

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

Yuma, AZ: Partly cloudy and sunny skies with highs in the low 100s and lows in the mid-70s to 80s.

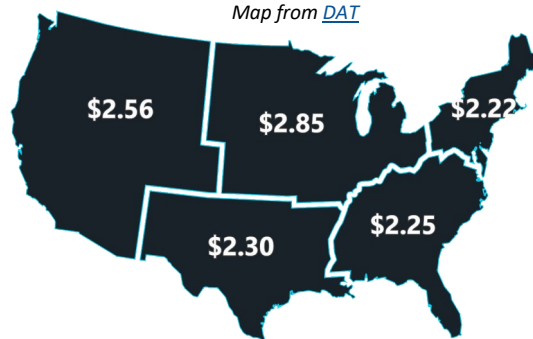
Immokalee, FL: Sunny and PM thunderstorms with highs in the 90s and lows in the 70s.

Idaho Falls, ID: Sunny skies with highs in the 80s and lows in the upper 40s with partly cloudy on Tuesday.

National Posted Rate per mile

previous week's average outbound reefer rate for each region

Map from [DAT](#)



MARKET ALERT

- Apple
- Asparagus
- Bell Peppers: Red & Yellow
- Berries: Blackberries & Blueberries
- Brussels Sprouts
- Cauliflower
- Citrus: Lemons & Oranges
- Cucumber
- Grapes
- Green Onions (Extreme)
- Herbs: Chervils, Cilantro & Dill
- Pepper Chili
- Pineapples
- Squash
- Tomatoes: Cherry & Grape

MARKET OUTLOOK

MARKET ALERT

Apples



SUPPLY
GOOD
QUALITY
GOOD

Granny Smith are the most affected by the crop gapping, followed by Golden Delicious, and Fuji. Highly recommend submitting your orders in with plenty of lead time. However, it is strongly advised to remove Granny Smith for two weeks until the fresh crop begins to harvest.

MARKET ALERT

Asparagus



SUPPLY
LIMITED
QUALITY
FAIR

Asparagus demand is still exceeding supply due to El Nino weather conditions, which have been made worse by recent hurricanes and storms in the growing regions. Sizing continues to be a challenge as yields continued to run smaller than normal. Shortages are expected to last through January. Supplies for Large, XL, and Jumbo continue to be extremely short. The market continues to be elevated, especially on larger, XL and jumbo sizes. Recommend being flexible with sizing at time of loading.

Avocados



SUPPLY
GOOD
QUALITY
GOOD

Mexico continues to harvest healthy volumes of Flora Loca, with a size curve skewing small. The USDA has not reported Mexican 32/36s for the past three weeks due to a lack of supplies. Aside from the 32/36s, there has been more of a balance of supply and demand, which has helped to reduce the cost of harvesting in the fields. When the Aventajada harvest ramps up and moves up in elevation, more sizes should be available. The color of the avocado's skin does not indicate ripeness. Avocados that are ripe and ready to eat may seem green in color, and the skin may be tough to the touch and not offer the same "give" when pressure is applied. When compared to mid and late season avocados, the fruit has less oil and takes longer to ripen.

Bananas



SUPPLY
GOOD
QUALITY
GOOD

Overall quality continues to be good, and there is currently no major concerns about bananas. There is a little vessel delay reaching Galveston, which may affect banana color staging. It may be a stage behind in the ripening process, but it is not expected to cause widespread or serious problems.

Beans



SUPPLY
GOOD
QUALITY
GOOD

Green Beans: Supply is good, and market is stable. Steady supply through September on the East coast. West coast market has come off a bit but still elevated. Due to the rain, heat, and recent hurricane, Mexico production and quality has been impacted with limited availability.

Snow Peas: Supplies are improving in the east. The market is steady. Demand are good with fair quality. Guatemalan production continues to be improved. Peruvian production is good but faces some challenges with quality.

MARKET OUTLOOK

MARKET ALERT

Berries



SUPPLY

FAIR

QUALITY

FAIR

Blackberries: **ALERT** Prices for Blackberries are trending up. Growers are reporting limited supplies out of the Pacific Northwest and Mexico. Growers in Mexico are forecasting increased supplies in the weeks to come. Growers are reporting challenges with quality.

Blueberries: **ALERT** Prices for Blueberries are trending up. Production is coming down out of the Pacific Northwest. The season well past the peak. Growers are reporting good quality.

Raspberries: Prices for Raspberries are trending down. Growers are expecting volume to come down for the rest of the month. Quality is good.

Broccoli



SUPPLY

FAIR

QUALITY

GOOD

Broccoli: Supplies continue to be fair with good quality. Supplies are available from Salinas, Santa Maria, and Mexico. Lower yields are being reported due to summer defects and growing gaps. Market pricing for Broccoli has increased and is expected to remain strong for a few weeks. (F.O.B. pricing for this week \$17.00 - \$18.00)

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

FAIR

QUALITY

FAIR

Supplies continue to be light with fair quality. Demand is strong. Market pricing and contracts will remain escalated. Supplies will remain light causing markets to remain high and prices continue to remain escalated. (F.O.B. pricing for this week \$48.00 - \$50.00)

Cabbages



SUPPLY

GOOD

QUALITY

GOOD

Supplies are steady with good quality. Growers are reporting better availability. Market pricing has improved. Products are coming from Salinas and Santa Maria. (F.O.B. pricing for this week \$12.00 - \$14.00)

Cantaloupes



SUPPLY

GOOD

QUALITY

GOOD

The cantaloupe market continues to trend upward. The sizing profile is shifting to 9/12s with a few 15s and should continue through September. Market has been primarily jumbo. Quality has been excellent with good shell color and internal quality. Brix level are mostly 13-16% range.

MARKET OUTLOOK



Carrots



SUPPLY

GOOD

QUALITY

GOOD

Overall, the quality and supply are good. All contracts are being fulfilled.

MARKET ALERT

Cauliflower



SUPPLY

FAIR

QUALITY

FAIR

Supplies are light. Demand is trending up. Quality is fair. Supplies are available from Salinas, Santa Maria, and Mexico. Supplies are expected to be limited. Lower yields are being reported due to summer defects and growing gaps. (F.O.B. pricing for this week \$17.00 - \$18.00)

Celery



SUPPLY

GOOD

QUALITY

GOOD

Supplies are steady with good quality. Supplies are currently coming from Salinas and Santa Maria. Market pricing is good and will not be escalated. Markets are expected to be good for the next few weeks. Good time to promote Celery. (F.O.B. pricing for this week \$11.00 - \$12.00)

MARKET ALERT

Citrus



SUPPLY

GOOD

QUALITY

GOOD

Limes: The market is elevated, and costs have increased. Northern Mexico has received heavy rain in recent weeks because of the various hurricanes and tropical storms that have impacted the surrounding area. The combination of supply shortages and increased Labor Day demand has created a supply chain imbalance. Extreme heat and humidity have impacted quality and shelf life, contributing to low availability. Quality has reached a seasonal low of 35% pack-out loss of total harvested yields. Within the following two or three weeks, expect to see an overall improvement in pricing, quality, and availability. Peak sizing is currently dominated by small fruit, including 230's and 250's; large and mid-sized fruit will become more available as the current production cycle progresses.

Lemons: ALERT Lemons have been tight all summer from all regions. D3 shippers had hoped to begin harvesting within the next week, but heavy rains have delayed harvesting until the end of September. Chile, Argentina, and Mexico have been covering but are struggling to maintain a constant weekly supply. Overall supply is expected to be better going into October once D3 starts. If loading oranges out of Florida is feasible, import lemons can be shipped to Florida, allowing trucks to load both. This will require some planning, so keep in touch with your supplier.

Oranges: ALERT Valencia 88's and smaller are very tight. Demand exceeds supply daily. Most years, the shift from Valencia to Navels has gone smoothly, but this year will be different. Valencia is expected to be done in the first week of October and Navels are delay until the first or second week of November due to weather. 72's and bigger CA Valencia or Florida Oranges are expected to start mid-October.



MARKET OUTLOOK

Corn



SUPPLY

GOOD

QUALITY

GOOD

Prices for Corn are mixed. Western corn is trending up while Eastern corn is down. Grower out of the East are reporting good supplies and quality.

MARKET ALERT

Cucumbers



SUPPLY

FAIR

QUALITY

GOOD

Prices for Slicing Cucumbers are trending up. Production out of the East was impacted by rain this week. Production out West is down a bit too. Growers are expecting the market to come off a bit in a week or two.

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

Hurricane Hilary devastated crops last week. 20% of the remaining crops were lost. This will take effect immediately and will last until mid-November. 20% of the remaining crops were lost. This will take effect immediately and will last until mid-November. A strong market is expected, as well as constrained supply in some cases. Although it is too early to tell, this issue may complicate the domestic/import transition.

MARKET OUTLOOK



MARKET ALERT

Herbs



SUPPLY
FAIR
QUALITY
FAIR

Quality has improved on the East coast. Imported **Chervil** availability remains low, and domestic **Dill** production continues to be affected due to the heat. The west coast continues to face quality challenges because of the weather, which causes inconsistent production.

Cilantro: ALERT Supplies are limited and the quality is fair. Market pricing has escalated. Supplies are now shipping out of Salinas and Santa Maria. Growers are reporting lower yields and fair quality. Market conditions are expected to continue for a few weeks. (F.O.B. pricing for this week \$18.00 - \$20.00)

Honeydews



SUPPLY
GOOD
QUALITY
GOOD

Honeydew supplies are steady. Sizing profiles are primarily 5/5J causing 6/8s to be limited and fetching a premium price. Demand is strong on 6/8s. Quality is good with occasional external scarring with brix level of 14-16% range.

Iceberg



SUPPLY
GOOD
QUALITY
GOOD

Supplies are good with improved quality. The weight is expected to improve, and lettuce heads will be back to normal. Yield is looking better, causing markets to improve. Market pricing is lower and expected to continue improving. Great time to promote iceberg lettuce. (F.O.B. pricing for this week \$11.00 - \$12.00)

Kale



SUPPLY
GOOD
QUALITY
GOOD

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

Leaf



SUPPLY
GOOD
QUALITY
GOOD

Green & Red Leaf: Supplies are good with fair quality and heavy insect presence due to warm weather. Sizing and carton weights are good. Markets and supplies to remain steady for the next few weeks. Great time to promote Green and Red Leaf lettuce. (Green Leaf F.O.B pricing for this week \$10.00 - \$12.00)(Red Leaf F.O.B. pricing for this week \$9.00 - \$11.00)

Romaine: Supplies are very good with good quality and heavy bug presence due to warmer weather. Carton weights are good. Expect market pricing to be steady along with supplies. Great time to promote Romaine. (Romaine F.O.B pricing for this week \$11.00 - \$12.00) (Hearts F.O.B pricing for this week \$14.00 - \$16.00)

Tender Leaf: Supplies are good with good demand. Quality is fair to good. Supplies and availability are improving due to better weather. Steady Market pricing and supplies are to be expected in the next few weeks. (F.O.B. pricing for this week \$4.75 - \$5.00)

MARKET OUTLOOK



Mushrooms



SUPPLY
GOOD
QUALITY
GOOD

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

Onions



SUPPLY
GOOD
QUALITY
GOOD

Quality is excellent with steady demand. The market is steady. All colors and sizes are shipping out of the Northwest. Colorado and Michigan are expected to start at the end of the week. Wisconsin is starting to harvest and will continue until the end of the year, while Utah will begin harvesting in early fall. This will also have an impact on precut.

MARKET ALERT

Onions Green



SUPPLY
FAIR
QUALITY
FAIR

EXTREME Supplies will be very limited for the next few weeks. Hurricane caused heavy rains and extreme wind conditions resulting in damage to the crops. Current supplies are coming from Mexico. The market will be escalating for the next few weeks. Expect fair quality for the next few weeks. (F.O.B. pricing for this week \$34.00 - \$36.00)

MARKET ALERT

Peppers Bell



SUPPLY
FAIR
QUALITY
GOOD

ALERT (Red & Yellow) Prices for Green Bell Peppers are trending down while the Red and Yellow Bell Peppers are trending up. Color Peppers are expected to be tight for the next 4 to 6 weeks. Hurricane Idalia impacted Georgia. Expect the Green Bell market to be volatile in the coming months.

MARKET ALERT

Peppers Chili



SUPPLY
POOR
QUALITY
POOR

Prices for Chili Peppers are trending slightly down. Supplies are improving a bit out West, but prices are still escalated. The Eastern market remains very tight.

MARKET ALERT

Pineapples



SUPPLY
FAIR
QUALITY
GOOD

Pineapple continues to be extremely tight, particularly in 5ct and 6ct. Crownless pineapples have also tightened up. There are still 8ct pineapples available. The size curve is likely to shift again toward larger fruit this month. Advise to be flexible on sizing at time of loading.

MARKET OUTLOOK

Potatoes



SUPPLY

FAIR

QUALITY

GOOD

Demand is slightly down with good quality from all growing regions. The market continues to trend down as new crops are being shipped from all growing regions. Better yields are being reported this year due to more acreage compared to the last few years. This will also affect precut.

MARKET ALERT

Squash



SUPPLY

FAIR

QUALITY

FAIR

Prices for Yellow and Zucchini Squash are trending up. The Northeast was impacted by rain this week. Growers are expecting some delays with the crop in Georgia due to Hurricane Idalia.

Strawberries



SUPPLY

GOOD

QUALITY

FAIR

Prices for Strawberries are trending down. Growers are reporting good volumes this week. Quality is being reported as fair to good. Volumes are expected to remain steady next week.

MARKET ALERT

Tomatoes



SUPPLY

FAIR

QUALITY

FAIR

ALERT (Cherry & Grape) Prices for Tomatoes are mixed. Production is coming out of California, Mexico, and various areas in the Northeast. The Grape Tomato market has come off a bit, but prices are still escalated. Growers are reporting that Ruskin didn't see any serious impact from Hurricane Idalia. Georgia and Quincy, FL weren't so lucky.

Watermelons



SUPPLY

GOOD

QUALITY

GOOD

Supplies are good. The market is trending down. Supplies are available in California, Delaware, Indiana, Maryland, Michigan, Missouri, North Carolina, Oklahoma, Texas, Virginia, and Washington. Limited supplies in Texas.

MARKET OUTLOOK

Produce Category Overview

Asparagus are extremely limited on Large, Jumbo, and XL. **Blackberries** and **Blueberries** have limited supplies. **Brussels Sprouts** are slightly better but remain escalated. **Chili Peppers** remain tight due to the weather. **Grapes** have been impacted and reduced by 30% due to the recent Hurricane in the west, causing a possible gap before offshore is available at the end of the year. Domestic **Lemons** are delayed until end of September due to all the rain they have received. **Valencia 88s** and smaller are tight with this variety expected to end the first week of October. **Navels** are delayed until the first or second week of November. Good time to promote **Broccolini, Carrots, Celery, Iceberg, Green and Red Leaf Lettuce, Kale, and Romaine.**

Agronomics Shorts: Extortion of lime farmers in Michoacán causes prices to soar

September 7, 2023 | freshfruitportal.com

The average daily prices of Limes in the US leaped by 15.08% in week 34, marking a \$4.50 increase on the prices recorded on August 24, from \$29.83 to \$34.33. Things have turned sour in one of Mexico's top lime producing regions, where many growers and packers have stopped working, rather than pay extortion money to cartels — causing the price of limes to spike.

A survey by the newspaper Milenio, has illuminated significant shifts in the pricing of limes within the markets of Morelia, the capital of Michoacán. The cost of one kilogram of limes has escalated from the range of 20 to 25 pesos (equivalent to US \$1.19 to \$1.49) to the range of 40 to 45 pesos (\$2.38 to \$2.68) within the previous week.

This price elevation concurs with the unfolding ten-day cessation of labor activities within Michoacán's Tierra Caliente region, an area encompassing a pivotal hub of lime production centered around the municipality of Apatzingán and characterized by its susceptibility to cartel-related activities.

It is worth highlighting that approximately 80% of Mexico's total lime output originates from the Tierra Caliente farms. Lime growers have forewarned of the potential for further price hikes if the prevailing regional conflict remains unresolved.

Accounts from certain lime growers suggest that criminal entities are demanding a fee of one peso per kilogram of limes sold, equating to a cumulative levy of 1,000 pesos (equivalent to US \$59.51) per metric ton. Others say they are demanding 2,000 pesos per tonne — 1,000 pesos from the grower and 1,000 pesos from the packer.

[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!

Your Dedicated NPC FB, LLC Staff

