



MARKET OUTLOOK

Apples



SUPPLY

FAIR

QUALITY

GOOD

The market remains firm this week as demand remains strong. Overall crop is down this year. Washington apple crop is significantly smaller than previous years. The heat Washington has experienced past summer has resulted in some challenges that the industry is still dealing with. The average fruit size appears to be down a half size to a full size and bi-color varieties had troubles reaching their optimum appeal. We can expect strong market for large, premium, high color No. 1 fruit. Premium Honeycrisp as well as Gala are tight this week. Pricing overall is running higher due to the shorter crop, inflation in the growing chain including labor, picking, and transporting of apples. Quality has been good.

MARKET ALERT

Asparagus



SUPPLY

FAIR

QUALITY

FAIR

Asparagus market is higher this week. With the Peruvian season coming to an end, the FOB in Florida is increasing. Volume in Mexico is still light currently. Larger sizes continues to be limited. In the next couple of weeks, we will transition completely to Mexican product.

Avocados



SUPPLY

GOOD

QUALITY

GOOD

Avocado volume has increased. Supply on 48s and larger is limited as retail demands for those sizes are expected to increase as we near the Super Bowl loading period. Demand remains high and inventories is slowing increasing for the biggest pull of the year. In the past, the market has increased after the Super Bowl, but many factors can sway this market up or down in mid-February such as the Super Bowl ad performance, the Mexico total crop volume are down, and Omicron variant hindering social gatherings.

Bananas



SUPPLY

GOOD

QUALITY

GOOD

Banana quality and availability continue to be good but expect the volume to be down in February due to the winter cycle the tropic will experience.

MARKET ALERT

Berries



SUPPLY

FAIR

QUALITY

FAIR

Blackberries: Prices for Blackberries are trending slightly down this week, but they're still elevated. Growers are reporting the usual seasonal tight supply situation. Look for tighter supplies for the next month or so.

Blueberries: Prices for Blueberries are trending up this week. Importers can't catch a break regarding unloading's and truck shortages. Covid is impacting supplies too. Availability is dependent on ships getting unloaded. Expect the current supply situation to continue for another month or so.

Raspberries: Prices for Raspberries are trending up this week. Growers are reporting the usual seasonal tight supply situation. Look for tighter supplies for the next month or so.

MARKET OUTLOOK

MARKET ALERT

Beans Green



SUPPLY

FAIR

QUALITY

GOOD

Green Beans: Florida continue to gap due to the colder weather in the growing area and it will cause a challenge with Mexico supplies. Expected elevated market in the east coast.

Snow Peas: Snow peas continue to be light out of Mexico causing the price to go up. Supplies out of East coast.

MARKET ALERT

Broccoli



SUPPLY

FAIR

QUALITY

GOOD

Supplies continue to be limited this week. Growers are reporting low yields at time of harvest. Market pricing increased from last week. Growers are expecting supplies to be lighter with the colder temperatures in Yuma AZ. (F.O.B pricing for this week \$22.40 - \$23.25)

MARKET ALERT

Brussels Sprouts



SUPPLY

SHORT

QUALITY

FAIR

Supplies continue to be extremely limited this week. Growers are reporting some improvement in yields going into next week. Quality is reported as good at this time. Expect for limited supplies the next few weeks (F.O.B pricing for this week \$42.45 - \$45.95)

MARKET ALERT

Carrots



SUPPLY

POOR

QUALITY

GOOD

California labor is still a huge problem. With short staff, some pack sizes are challenging and to keep decent volume is complicated. There are a few items being prorated but we hope to be over this in about 3 weeks. Quality and flavor are excellent.

Cantaloupes



SUPPLY

GOOD

QUALITY

GOOD

Market has begun to shift as demand has increased over the past week primarily due to very large retail promotion. Jumbo fruit is beginning to make its appearance as the smaller sizes, 12/15s, begin to drop in production. Quality has been good.

MARKET ALERT

Cauliflower



SUPPLY

SHORT

QUALITY

FAIR

Supplies continue to be very short this week. Overall quality is reported as fair only, growers are reporting lower yields at the time of harvest. Supplies are expected to improve next week. (F.O.B pricing for this week \$33.05 - \$35.05)

MARKET OUTLOOK



Celery



SUPPLY

GOOD

QUALITY

GOOD

Supplies will be good this week. Demand has slowed down this week. New Crop out of Yuma has started. Market is more active this week compared to last. Current harvest is coming from Oxnard CA and Yuma AZ. (F.O.B pricing for this week \$14.75 - \$16.47)

MARKET ALERT

Citrus



SUPPLY

FAIR

QUALITY

FAIR

Limes ALERT: Pricing has declined a bit in response to slower movement and “slightly” higher crossings. Overall availability and yields are expected to decline again in February per our seasonal timeline and prices to be elevated.

Lemons: Lemon market and availability are currently steady. Peak sizing on 115/140 count fancy with limited 165 and smaller. Mexican lemons are being shipped into Texas with Nogales being done. California lemons are coming out of District 1 and 3.

Oranges RADAR: We are moving into the shortest Navel crop we have seen in several years. 88's and smaller are about to be extremely tight. Many shippers are planning to start with Valencia's to help with small fruit but will be leaving the whole summer in a demand exceeds supply issue. We could deal with this problem and have the toughest April – Oct we have had in long time.

MARKET ALERT

Corn



SUPPLY

FAIR

QUALITY

FAIR

Prices for Corn is trending up this week. Corn out of Florida continues to be seasonally tight. Growers are reporting that the size is smaller. That's typical for this time of year. Product is from Mexico is crossing through Nogales. That's covering demands out West.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Cucumbers are trending down this week. Mexico is ramping up nicely. Imports out of Honduras are being hampered by supply chain challenges including off loading at the ports.

Eggplant



SUPPLY

GOOD

QUALITY

GOOD

Prices for Eggplants are trending down this week. Supplies usually tighter this time of year. Production out of Florida and Mexico has been impacted by cooler weather. Growers are reporting nice quality though.



MARKET OUTLOOK

MARKET ALERT

Grapes



SUPPLY
SHORT
QUALITY
FAIR

No change on the grape market. As an industry, we are in the same situation as we have for weeks as demand continues to exceed supplies. The transition from a short California crop to import grapes has been nothing but challenging. It's a struggle across the entire supply chain on both coasts with container shortages and delays, transloading/cross-docking, labor, and USDA holds. West Coast are seeing longer delays. Combination of all these things is causing demand to rise on all grapes varieties and prices to be high. Reds are the most impacted. Market is expecting to get better some time February.

MARKET ALERT

Herbs



SUPPLY
FAIR
QUALITY
GOOD

Cilantro: Supplies will be limited this week. Most growers will be shipping out of Yuma and Mexico next week. Freezing temperatures has slowed down plant growth. (F.O.B pricing for this week \$21.00- \$22.00)
Rosemary: Rosemary continue to be short supplies on the west coast due to cooler weather in Mexico but available in the East coast.

Honeydews



SUPPLY
FAIR
QUALITY
GOOD

Offshore honeydews have started to provide some relief to the overall market. Honeydew from South Mexico are tight shipping from Nogales and South Texas. Expecting the market to settle down towards the end of January since Honduran production as started. Quality and brix level have been good despite the honeydew show some external scarring.

Iceberg



SUPPLY
GOOD
QUALITY
GOOD

Supplies continue to be steady this week. Market pricing continues to be good. Quality and Weights will continue to be very good this week. Expect some outer leaf quality issues due to early morning frost in Yuma. Growers are expecting for steady supplies the next few weeks. (F.O.B pricing for this week \$10.47 - \$11.47)

MARKET ALERT

Leaf



SUPPLY
GOOD
QUALITY
GOOD

Romaine ALERT: Supplies are light this week. Overall quality is only fair currently. Weights will be on the lighter side until supplies improve. Expect some outer leaf quality issues due to early morning Frost in Yuma. Growers are expecting better supplies in the upcoming weeks. Supply and Quality are Fair. (Romaine pricing for this week \$15.57 - \$17.97) (Romaine Hearts pricing for this week \$21.80 - \$23.55).

Green & Red Leaf Lettuce: Supplies continue to be good this week. Growers are reporting short yields due to colder temperatures. Quality is reported fair to good for this week. Supplies will continue to improve and remain steady for a few weeks. (F.O.B pricing for this week \$9.03 - \$11.00)

Tender Leaf: Supplies continue to be good this week. Demand is good on tender leaf; quality is very good. Supplies should remain steady for a few weeks. (F.O.B pricing for this week \$4.65 - \$4.75)

MARKET OUTLOOK



MARKET ALERT

Mushrooms



SUPPLY

SHORT

QUALITY

GOOD

Shitake Mushrooms: 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. Quality is Fair.

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.

MARKET ALERT

Onions



SUPPLY

FAIR

QUALITY

GOOD

This market remains of high concern for the duration of this crop. Price remain much higher than average with reduced yields. Expect the OR/ID crop to remain high and tight. Reds have increased in price and will continue to climb. Onions from Mexico is starting to cross the border but won't see good volume until February. Waiting to see what the Mexico crop brings to the table here in a couple of weeks. Labor shortage and freight continues to be challenging to all the growing regions.

MARKET ALERT

Onions Green



SUPPLY

SHORT

QUALITY

FAIR

Supplies continue to be extremely short this week. Market pricing continues to be high. Quality will only be fair at this time. Supplies coming from Mexico will be extremely limited for the next few weeks. Cold weather has also slowed down crop growth. (F.O.B pricing for this week \$28.47 - \$31.00)

Pears



SUPPLY

FAIR

QUALITY

FAIR

New crop Bartletts, Anjou, red pears and Bosc are now shipping out of Washington State and Oregon. The volume this year seems to be light with the fruit expecting to run a size or two smaller than last season. The large high-quality fruit will bring a premium this year and the prices will trend up over the next couple of months on them. Prices on Bartlett pears is rising with strong demand in the last few weeks. Most shippers will finish up with their Bartlett crop sometime in January early February.

Peppers Bell



SUPPLY

GOOD

QUALITY

GOOD

Prices for Green Bell Peppers are trending up this week. Prices for Red and Yellow are trending down. We are getting reports that many growers are reporting a lot of Covid related staffing shortages. This is impacting all areas of the supply chain. The new fields in Florida are in the early stages of ramping up production. Supplies out of Mexico are still tight due to the previous holiday closures. Look for tight markets for another week or two.

MARKET ALERT

Peppers Chili



SUPPLY

GOOD

QUALITY

GOOD

Prices for Chili Peppers are trending down this week. Supplies are improving but are typically tight this time a year. Production is coming out of Central & South Florida as well as Mexico.

MARKET OUTLOOK

Pineapples



SUPPLY

GOOD

QUALITY

GOOD

While Pineapple volume is where we would like it to be this time of year, we are experiencing a higher cost to go to market. Quality and taste profile are great.

MARKET ALERT

Potatoes



SUPPLY

FAIR

QUALITY

GOOD

This market remains of high concern for the duration of this crop. Potato market has stabilized on all sizes for now but it's a mixed profile depending on the region. Price remain much higher than average with reduced yields. Cold weather and snow are now playing a part in the northwest along with continued shortage of trucks and freight concerns. With the shortage on trucks, freights continue to be extremely high.

Squash



SUPPLY

FAIR

QUALITY

FAIR

Prices for Green Squash are stable this week with an upward bias. Prices for Yellow Squash are trending up. Production is picking up out of Mexico. Cool weather out of Florida has impacted supplies and costing. Growers out of Mexico and Florida are reporting labor shortages associated with Covid too.

MARKET ALERT

Strawberries



SUPPLY

FAIR

QUALITY

FAIR

Prices for strawberries is trending slightly down this week but they're still elevated. Supplies out of Florida were impacted by recent cold weather. Production out of California & Mexico is slowly picking up. Valentine's day is right around the corner and it will put pressure on the market. The wild card is always weather between now and Valentine's Day.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

Prices for 20 lb Round Tomatoes are stable this week. Prices for 25 lb Rounds and Grape tomatoes are trending slightly up. Roma's are trending down. Production out of Florida is dependent on weather. They recently had some cool weather and that slowed down volumes. Production out of Mexico is picking up. Covid and Staffing needs is currently impacting Mexico and Florida

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Seedless watermelons in Florida are off to a good start with continued supplies expected until early April. Arizona and Texas are shipping watermelons from Southern Mexico. Expect light supplies in January on seedless.

Truck accessibility pressures moving already limited potato crops

Getting supplies of potatoes is proving increasingly difficult this season.

To begin with, crops around the country have seen varying yields. “The crop in Idaho that had really severe heat during the summer, it reduced their yields by 20-30 percent. That has an effect not just on the table market but also on the process market. The processors say they need product,” says Ken Gad of South Easton, MA-based Cambridge Farms Inc.

Nearby Washington State also had a reduced crop from the heat and North Dakota and Colorado also had less tonnage. “So we don’t have as many potatoes as we normally would,” says Gad. In turn, that has processors turning to product that would normally be sent through consumer channels. “We’ve seen Western Processors buy product in Maine even and ship them via truck and rail. That’s affected the Russet supply.”

PEI’s absence

On the East Coast, other factors are pressuring supplies starting with the Canadian Food Inspection Agency (CFIA) decision’s in late November to suspend the certification of exports of all Prince Edward Island’s potatoes to the U.S. “They may not come to this country the remainder of the season. Some people are now curious if they’ll even be here by next season,” says Gad. “We hope they are. There’s a definite need for PEI potatoes to supplement the Eastern potato supply. It’s a good quality potato and it’s a substantial amount they supplement.”

And while Maine had a good crop of potatoes, its potato plantings have shifted over recent years. “The round white volume has diminished greatly while the yellow volume has increased. People are substituting yellows for whites more and more, even at a cost. So there are not a lot of whites grown in Maine anymore from major growers. Those whites came from PEI,” says Gad. Yellow tonnage in Maine was also reduced thanks to concerns over quality and varieties available and the opportunity to stay with the tried-and-true Russets.

But that’s not all that’s affecting the potato market. “Now go find a truck. That’s the punchline to this whole thing,” says Gad. “The transportation issues are real. If you don’t order extra, if you don’t order days ahead and think you’re going to get by with just-in-time inventory, you are going to be out of product. You need to order two to three days in advance, over-order and then back off your orders to keep your warehouse plugged.”

Turning to intermodal

What is helping however is an alternate logistics solution such as intermodal transit. “It’s been a bit of a saviour,” Gad says. “On a freight rate that might be \$11/package, intermodal will come across at \$9/package. But you still need to hook a cab up to product coming off a train.”

All of this of course has led to increased pricing on potatoes. “Pricing has been rational on the part of the farmers. If you didn’t have the truck situation, they might ask for a bit more money based on their crops. They’re getting a decent return on their product,” Gad says. “But when you couple it with the cost of the transportation, there’s going to be a point that we can’t afford this in this economy. In some cases, freight is up 100 percent--freight that was \$5,000 is now \$10,000. There comes a point where the truck pricing is gouging and we have gone way past that. The markets can only go so high until they stop and that’s going to be the fault of the transportation not the farmer.”

<https://www.freshplaza.com/article/9391302/truck-accessibility-pressures-moving-already-limited-potato-crops/>

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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!