

MARKET OUTLOOK



Apples



SUPPLY

FAIR

QUALITY

GOOD

With less than 100 million boxes, Washington state's crop is the smallest since 2005. The average Washington apple crop is 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. During and after the Covid outbreak, whatever domestic labor was available has lost interest in working. Despite the high cost of the national H-2A immigrant labor program, many growers cannot afford to both hire or not hire H-2A workers.

Asparagus



SUPPLY

FAIR

QUALITY

GOOD

RADAR The Caborca season will likely begin in the middle of January or even February, depending on the weather. Light supplies will be available from Mexico and Peru until the end of January.

Avocados



SUPPLY

GOOD

QUALITY

GOOD

Mexico production will start to increase after the slow down due to the holidays. As Aventajada fruit matures, dry matter increases, and holding temperatures should be set at 42 degrees. USDA average pricing has been steady for past 8 weeks. As a result of market's stability, more promotions have been made. The most notable adjustment is the shift in the size curve, a higher percentage of extra-large fruit is coming off the trees and is expected to last several weeks.

Bananas



SUPPLY

GOOD

QUALITY

GOOD

Banana is showing good quality and supply is expecting to remain stable through the remainder of the year. It has gotten a little cooler in the tropics, which is typical for this time of year. Be sure to adhere to best practices when handling bananas, even though quality remain strong.

Beans



SUPPLY

FAIR

QUALITY

GOOD

Green Beans: Due to the near-freezing weather last week, Florida production has light supplies on the East coast. On the West coast, the market is stable, and volume is good.

Snow Peas: Snow peas from Mexico are good, and supplies from California are improving. Guatemala production continues to improve.

MARKET OUTLOOK



<p>MARKET ALERT</p> <p>Berries</p>  <p><u>SUPPLY</u> FAIR <u>QUALITY</u> GOOD</p>	<p>Blackberries: Prices for Blackberries are trending down this week. Growers are reporting good quality with volumes expected to pick up a bit towards the end of January.</p> <p>Blueberries: Prices for Blueberries are trending up this week. Look for improving availability going forward. Chili and Mexico for forecasting higher volumes.</p> <p>Raspberries: ALERT Prices for Raspberries are trending up this week. Growers are forecasting tight supplies until the front end of February. Quality is being reported as fair.</p>
<p>MARKET ALERT</p> <p>Broccoli</p>  <p><u>SUPPLY</u> FAIR <u>QUALITY</u> FAIR</p>	<p>Broccoli supply is improving. Demand has slowed down. Market pricing has remained strong. Cold weather has slowed down supplies on Broccoli crowns. Supplies are coming from Yuma, Santa Maria, and Mexico. Better supplies are expected to improve next week. (F.O.B pricing for this week \$42.00 - \$43.00)</p>
<p>Brussels Sprouts</p>  <p><u>SUPPLY</u> GOOD <u>QUALITY</u> GOOD</p>	<p>Brussels sprouts supplies are very good with good quality. Demand continues to remain steady. Mexico production has improved. Steady demand for Brussel Sprouts is expected the next few weeks. (F.O.B pricing for this week \$28.65 - \$29.45)</p>
<p>Cabbages</p>  <p><u>SUPPLY</u> GOOD <u>QUALITY</u> GOOD</p>	<p>Supplies are much better for this week. Growers are reporting better yields at the time of harvest. Expect market pricing to continue improving the next few weeks. Product is coming from Yuma. (F.O.B pricing for this week \$17.50 - \$18.45)</p>
<p>MARKET ALERT</p> <p>Carrots</p>  <p><u>SUPPLY</u> GOOD <u>QUALITY</u> GOOD</p>	<p>The carrot crop has been jeopardized due to weather conditions. Peeled, jumbos, and cellos are the hardest hit. Fields are assessing the damage and predicting shortages for at least four weeks.</p>
<p>Cantaloupes</p>  <p><u>SUPPLY</u> FAIR <u>QUALITY</u> GOOD</p>	<p>The season for domestic cantaloupe has come to an end. Cold weather has impacted Guatemala's growing regions, slowing down the production, and affecting the already limited supply. Demand is active. Light production coming out of Mexico. Both offshore and Mexican cantaloupe have good quality and brix.</p>

MARKET OUTLOOK



MARKET ALERT

Cauliflower



SUPPLY
POOR
QUALITY
POOR

EXTREME ALERT Cauliflower supplies has improved. Demand has slowed down. Market pricing has improved compared to last week. Cold Cauliflower supplies were slowed down by the cold weather. Current supplies are coming from Yuma, Santa Maria, and Mexico. Better supplies are expected to be available next week. (F.O.B pricing for this week \$25.00 - \$27.00)

MARKET ALERT

Celery



SUPPLY
POOR
QUALITY
POOR

EXTREME ALERT Supplies continue to be very light this week. Quality has been reported as only fair at this time. Supplies are coming from Oxnard and Yuma. Market is expected to remain high. Fusarium disease is affecting yields in Oxnard. (F.O.B pricing for this week \$75.00 - \$77.00)

Citrus



SUPPLY
GOOD
QUALITY
GOOD

Limes: RADAR The market remains elevated, but demand has flatlined in response to the holiday aftermath. Pricing is expected to remain relatively stable this week before inching up again as we progress through January. The current production cycle is coming to an end; some groves have already begun harvesting the new crop. Overall quality and shelf life will improve, and peak sizes will shift to smaller fruit. Yields are expected to remain scarce because of weather-related trends; cooler temperatures cause crop growth to slow.

Lemons: California lemons are being picked in D1. Quality has been good. The appearance is picture perfect with bright yellow with a slivering tinge.

Oranges: Weather in California are favorable, with pleasant, cool days. The incredible flavor profile of California citrus so far indicates a great eating season. Navels displaying excellent natural color and increasing brix. While small fruit is peaking, values are in the 88s/113s, with 72s beginning to make volumes.

MARKET ALERT

Corn



SUPPLY
FAIR
QUALITY
FAIR

ALERT (Florida) Prices for Corn out of Mexico are mostly stable this week. Prices for Corn out of Florida are trending up. Volume for corn is picking up out of Mexico. Cool weather has had an impact on Florida corn. Growers are reporting smaller than usual ears right now. As you are aware, the quality of the winter corn crop differs from that of the summer crop.

MARKET OUTLOOK



MARKET ALERT

Cucumbers



SUPPLY
FAIR

QUALITY
GOOD

ALERT (English, Persian & Slicing) Prices for Persian and English Cucumbers continues to be extremely elevated. Prices for Slicing Cucumbers continues to trend up. Growers are expecting Slicing Cucumber supplies to increase during the weeks to come. Look for Persian and English Cucumbers to be extremely tight during the next couple weeks.

MARKET ALERT

Garlic



SUPPLY
FAIR

QUALITY
GOOD

Domestic garlic continues to remain tight. Harvest started late this season and growers are holding averages to try and minimized company buying heavy early in the season. Quality is good and the price is high.

Ginger



SUPPLY
FAIR

QUALITY
GOOD

The market for imported ginger is active, and supplies are light.

Grapes



SUPPLY
GOOD

QUALITY
GOOD

RADAR In the first two weeks of January, South American grape imports may be a little light. The early Chilean grape harvest is running behind schedule. Peruvian grape loadings have recently been delayed due to protests that have prevented workers from getting to farms and facilities to pick and pack. Arrivals have not yet been seriously disrupted. Anticipate some supply gaps by early January.

MARKET ALERT

Herbs



SUPPLY
LIMITED

QUALITY
FAIR

The cooler weather has impacted all herbs coming from Mexico and Colombia. Expect quality and supply issues for basil, chives, dill, mint, oregano, and rosemary from all growing regions. Weather conditions, lower yields, fewer acres, and high demand will persist through mid to late January. Flight disruptions and labor shortages following the holiday are causing logistical challenges and supplies shortages.

Cilantro: ALERT Supplies are improving for this week. Quality will only be fair going into next week. Most growers will be shipping out of Oxnard and Imperial Valley CA. Cold temperatures have greatly affected yields and quality. (F.O.B. Price for this week \$16.45 - \$17.65)

MARKET OUTLOOK

Honeydews



SUPPLY
FAIR
QUALITY
GOOD

Offshore honeydew is light and alternate growing area is not yet ready, resulting in a supply gap. With the recent colder temperature, expecting light production for a couple of weeks. Quality and brix are good.

MARKET ALERT

Iceberg



SUPPLY
LIMITED
QUALITY
FAIR

EXTREME ALERT Supplies continue to improve this week. The overall quality is good but expect some frost damage. Weights and quality are expected to improve next week. Markets is expected to continue to improve and experience some relief. Growers are now harvesting in Yuma and Imperial Valley. (F.O.B pricing for this week \$38.00 - \$39.00)

Kale



SUPPLY
GOOD
QUALITY
GOOD

Supplies continue to be steady for next week. Demand is down on Green Kale. Quality is good. Supplies should remain steady for the next few weeks. Market pricing is improving. (F.O.B pricing for this week \$11.65 - \$12.15)

MARKET ALERT

Leaf



SUPPLY
LIMITED
QUALITY
POOR

Green & Red Leaf: ALERT (Red Leaf) Supplies continue to improve this week. Quality is only fair with occasional wind/fringe burn. Market pricing has improved and not currently escalated. Harvest is coming from Imperial Valley and Yuma. (Green Leaf F.O.B pricing for this week \$15.75 - \$16.45)(Red Leaf F.O.B pricing for this week \$22.45 - \$23.15)

Romaine: ALERT Supplies continue to improve this week. Romaine heads are looking better and returning to normal sizing. Markets are expected to improve, which will have an impact on market pricing. Expect the occasional epidermal peel and blister due to frost. Growers are now harvesting in Yuma and Imperial Valley. (Romaine F.O.B. pricing for this week \$23.00 - \$24.00)(Romaine Hearts F.O.B. pricing for this week \$38.00 - \$41.00)

Tender Leaf: Supplies are steady for this week. Demand continues to be very good. Supply will continue to improve. Unusual cold temperatures have slowed down yields. Market pricing has returned to normal. Growers are now harvesting in Yuma. (F.O.B pricing for this week \$4.75 - \$5.15)

MARKET OUTLOOK

MARKET ALERT

Mushrooms



SUPPLY
SHORT
QUALITY
FAIR

Shitake Mushrooms: EXTREME ALERT 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.

EXTREME ALERT 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.

Onions



SUPPLY
GOOD
QUALITY
GOOD

Onions are shipping out of Colorado, Idaho, Michigan, North Dakota, Oregon, Utah, and Washington. Colorado and Utah are wrapping up. Quality is good. Demand and Market are steady. Super Colossal and Colossal Yellow onions continue to fetch a premium pricing due to the limited availability. Yields are down, as are acres planted, compared to the previous year. Trucks are starting to get tight in some region and freight cost are high. This will also have an impact on pre-cut.

MARKET ALERT

Onions Green



SUPPLY
LIMITED
QUALITY
FAIR

Supplies continues to be very limited. Due to the limited availability, market pricing has increased. Green onions are coming from Mexico. Yields have been impacted by unusually cold temperatures. (F.O.B pricing for this week \$31.00 - \$32.00)

Pears



SUPPLY
GOOD
QUALITY
GOOD

The organic pear crop in the Pacific Northwest appears to be promising, with estimates indicating a volume increase over last year. Most organic varieties are seeing increased volume, which is encouraging in a year when much of Northwest tree fruit volume has been down. Sizing is looking to be two sizes smaller this year on summer pears (red and green Bartlett and, Starkrimson). The whole Northwest pear crop is estimated to be slightly up year-over-year, further strengthening the organic pear category.

MARKET ALERT

Peppers Bell



SUPPLY
FAIR
QUALITY
GOOD

ALERT (Red & Yellow) Prices for Green Peppers are trending up this week. Prices for Red Peppers are slightly up. Yellow Pepper prices are stable this week. Cool weather in Florida and Mexico as well as tight labor due to the holidays, has push the market up. Growers are expecting higher volumes during the weeks to come.

MARKET ALERT

Peppers Chili



SUPPLY
FAIR
QUALITY
GOOD

Prices for Chili are mostly trending up this week. Prices for Serrano and Poblano Peppers are still elevated. Supplies remain tight out of Florida and Mexico. Growers are expecting higher volumes going forward as we put the holidays behind us.

MARKET OUTLOOK

Pineapples



SUPPLY

FAIR

QUALITY

GOOD

In the next few weeks, Pineapples are expected to start trending towards smaller sizes. The yield is improving and more 7ct and 8ct Pineapples are expected to be available. Quality is good with good brix level. Market is steady and demand is light.

MARKET ALERT

Potatoes



SUPPLY

FAIR

QUALITY

GOOD

Prices remain elevated as storage volume begins to dwindle. The market remains strong, and demand remains consistent. Limited volume on the larger sizes. Packer is trying to stretch their inventory until New Crop start. Precut potatoes will be impacted as well.

Squash



SUPPLY

FAIR

QUALITY

GOOD

Prices for Zucchini Squash and Yellow Squash are trending up this week. Cooler weather in Florida and Mexico have reduced volume, and the labor has been affected by the holidays. Growers are expecting the markets to normalize with higher volumes going forward.

MARKET ALERT

Strawberries



SUPPLY

POOR

QUALITY

POOR

Prices for Strawberries are trending up this week. Supplies are tighter for Strawberries this week due to cold weather in Florida and Mexico. The drought in California appeared to be over after the state received record rainfall in the last few weeks. The market is extremely tight in California as they work through the rain events. Supplies out of Mexico are steady.

Tomatoes



SUPPLY

FAIR

QUALITY

FAIR

Prices for 20 lb Rounds and Roma are trending up this week. Prices for 25 lb Rounds, Grapes, and Cherry are trending down. Cooler temperatures in Florida and Mexico have reduced volume somewhat, and the labor has been affected by the holidays. Growers are forecasting an increase in volumes in the weeks to come.

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Supplies on Seedless and minis are still in short supply. Market will be very tight through February. Florida has light supplies with small fruit. Southern Mexico has begun to ship out of Edinburg and Nogales. There is little offshore production.



MARKET OUTLOOK

Heavy rains could cause gaps in California production

January 06, 2023

It's a storm that looks to be hitting the entire state. Following a day of evacuation orders and flash flood warnings in parts of California after heavy wind and rain, where is this leaving California agricultural production?

"In California, we never say bad things about the rain. However it is affecting us in a small way," says Derek Vaughn of Johnston Farms in Edison, California. "We are hoping this rain will help size up the fruit as we have been fighting with small fruit all season long."

Levon Ganajian agrees. "We need the rain so badly. It can't rain enough as far as we're concerned," says Ganajian of Fresno, California-based Trinity Fruit Sales, which has some 3,400 acres of mandarins. "All this rain has recharged the underground water and decreased the bicarbonates in the soil that makes for a healthier orchard," says Ganajian.

Readying for the storm

However, seeing what was coming, growers were preparing for the rain. Vaughn says it was picking heavily for two days during the gap in rainstorms over the weekend.

Ditto Trinity Fruit. "The last clear day we picked five days of fruit in one day," says Ganajian. "Some fields were muddy and we could only pick on the outskirts of the orchard. You couldn't go in so that limited production too. We also harvest everything by Brix so while we're trying to harvest as much as we can, we can't just clean all the trees out."

The muddy fields, standing water and rain have all led to gaps in picking. "The Santa Maria Valley has experienced heavy rainfall and strong winds over the last few days, resulting in standing water at multiple locations on our land and limiting access to harvest," adds Matt Hiltner of Babé Farms, Inc. "We're working around the affected areas and continuing to fill orders. We're fortunate to be positioned on well-drained land and expect a quick recovery following the wet weather."

Strawberry quality challenges

In strawberry production, Mark Shaw, VP of operations for Markon notes that harvest was brought to a halt in Santa Maria, Oxnard, Orange County and Coachella, California on Monday, Tuesday and Wednesday. "Multiple inches of rain fell on the California Coast (Santa Maria and Oxnard) as well as in Orange County. Quality challenges have been reported, including bruising, pin rot, decreased shelf-life and conditions unsuitable for harvesting crews," says Shaw.

However back in citrus, Vaughn notes that the weather's effect on citrus has helped tighten up the California navel market and allowed most who were carrying inventory to clear the floor.

"The challenge is trying to cover our orders with the demand, especially at the start of the year when there's big demand," says Ganajian.

To help keep customers covered, Hiltner notes that particularly over the next few days it's communicating openly with its customers about any shortages.

Lettuce production spared

What hasn't been faced with further issues looks to be the lettuce market following late 2022's spike in prices and tight supplies. "Storms have not heavily impacted the Arizona/California desert growing districts so harvesting has been proceeding daily as scheduled," says Shaw.

There will though be the long-term challenge of saturated fields in the Salinas and Santa Maria Valleys preventing growers from entering fields to plant for the April 2023 harvest. "Some growers were able to plant before the rain started falling, but no one has been able to plant...."

[Read full article HERE](#)

Publication date: Fri 6 Jan 2023

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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!

Your Dedicated NPC, LLC Staff

