



**WEEK 42 : October 17 - October 23, 2022**  
**MARKET OUTLOOK**

**HURRICANE IAN ALERT:** Ian will impact availability and prices for all Fruits and Vegetables grown in the East for the unforeseeable future. Please reach out to your NPC rep/local distributor if you have any concerns.

**Transportation:**

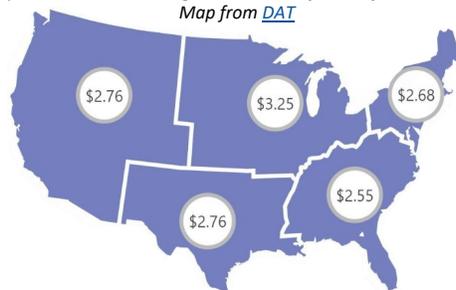
**National Diesel Average:** \$5.224

**Compared to Last Year:** \$3.586

**National Fuel Surcharge:** \$0.65

**Shortages:** Seeing high freight rates, with **extreme** shortages—none; **slight** shortages in ID & NC

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



**Regional Weather Update:**

**Oxnard, CA:** Partly cloudy with highs in the 60s to 70s and lows in the high 50s to 60s.

**Salinas, CA:** Cloudy with highs in the high 60s to mid-70s and lows in the mid-50s.

**Yuma, AZ:** Sunny and cloudy throughout the week with highs in the low mid-80s to 90s and lows in the 60s to 70s.

**Immokalee, FL:** Sunny and partly cloudy throughout the week with highs in 80s and lows in the 60s with morning showers on Sunday.

**Idaho Falls, ID:** Sunny with highs in the mid-60s to 70s and lows in the 30s.

**MARKET ALERT**

**Berries: Blackberries & Strawberries**

Broccoli

Cabbages

Cauliflower

**Citrus: Limes (Radar), Oranges (CA)**

Cilantro (Extreme)

**Cucumbers: English & Persian (Extreme—Force Majeure)**

Eggplant

Garlic

Green Beans

Green Onions (Extreme)

**Lettuces (Extreme): Iceberg, Green Leaf, Romaine & Romaine Hearts**

Mushrooms

Onions

**Pepper Bell: Red & Yellow**

**Peppers: Chili & Tomatillos**

Potatoes

**Squash: Yellow & Zucchini**

**Tomatoes {Force Majeure}**

# MARKET OUTLOOK



## Apples



SUPPLY  
FAIR  
QUALITY  
GOOD

The guesstimate for the Washington Apple Crop came out at 108,700,000 which is 11.1% less than last season. This does include Organics. Conventional only – the State is 12% down so basically the shrink is in Conventional where Organics are down slightly. Galas are not growing so peak sizes look to be 113/125 then 100cts. 88ct Galas are going to be extremely tight and very expensive all year. It's very important to move 88ct into 100ct (only 1/4 size difference). There can be significant price difference between. The other varieties are too early to tell the size profile because a lot can happen between now and harvest. The unknown factor is how Michigan, NY and PA will affect movement out of Washington.

## Asparagus



SUPPLY  
FAIR  
QUALITY  
FAIR

Peruvian production is steady and starting to see larger sizes. Mexico production is down due to heat and rain, affecting the bigger sizes. Quality is fair. Market is active.

## Avocados



SUPPLY  
GOOD  
QUALITY  
GOOD

Mexico continues to harvest strong volumes, with available orchards increasing. Availability on all sizes. California and Peruvian fruit are winding down. Columbian avocados are starting to arrive. November may bring on some different dynamics with Mexico feeding the lions share of the US avocado demand, and a shift in size curve as we progress into the season and fruit sizes up on the trees.

## Bananas



SUPPLY  
GOOD  
QUALITY  
GOOD

Banana situation is improving with volume beginning to increase.

## Berries



SUPPLY  
GOOD  
QUALITY  
GOOD

**Blackberries:** **ALERT** Prices for Blackberries are trending down slightly this week. The quality out of Mexico is good. Production is picking up.

**Blueberries:** Prices for Blueberries are trending down slightly week. Growers and importers are reporting light supplies. They're reporting good quality.

**Raspberries:** Prices for Raspberries are trending down this week. Growers are reporting that production is decreasing, and the quality is fair.

# MARKET OUTLOOK



**MARKET ALERT**

**Beans**



SUPPLY  
FAIR  
QUALITY  
FAIR

**Green Beans: ALERT** Beans are starting to transition south with some quality issue. Florida is expected to start mid-November. Hurricane Ian had cause power outages to some packing facility, causing supplies to be limited and also cause a halt on planting new crops. Availability continues to be day to day on the West Coast along with some quality issue. Demand has exceeded the supplies. Orders are starting to be prorated.

**Snow Peas:** Domestic and Mexico supplies are steady with fair to good quality while production and quality continues to be an issue from Guatemala.

**MARKET ALERT**

**Broccoli**



SUPPLY  
LIMITED  
QUALITY  
POOR

Supplies continue to be light this week. Demand is strong this week. Encountering some hollow core. Market pricing is expected to remain escalated going into next week. Expect for pricing to remain strong going into next week. Supplies out of Mexico will continue to remain limited. (F.O.B pricing for this week \$37.60 - \$38.60)

**Brussels Sprouts**



SUPPLY  
GOOD  
QUALITY  
GOOD

Supplies continue to be steady this week. Quality has improved, weather conditions in CA has caused some occasional mildew. Demand for Brussel Sprouts is steady. Market pricing is good and will remain favorable the next few weeks. Great time to promote Brussel Sprouts. (F.O.B pricing for this week \$19.65 - \$20.95)

**MARKET ALERT**

**Cabbages**



SUPPLY  
FAIR  
QUALITY  
FAIR

Supplies will be limited going into next week. Growers are reporting lower yields during this week's harvest. Past rains and extreme hot weather have caused some issues with yields. Expect market pricing to remain escalated going into next week. (F.O.B pricing for this week \$22.00 - \$24.00)

**Carrots**



SUPPLY  
GOOD  
QUALITY  
GOOD

Shippers fulfilling 100% on jumbo carrots now. Availability and quality are good. Some packing out of Salinas and crop looking great.

**Cantaloupes**



SUPPLY  
FAIR  
QUALITY  
GOOD

Sizing on cantaloupe is running small from California as they are wrapping up and transitioning to Yuma, which will run through mid-November. Sizing is on the fruit from Arizona will primarily be jumbo. Import melons are expecting to arrive the second week of November. With Hurricane Julia hitting central America a few days ago and now the rain the growing regions are receiving, the true impact is unknown since they cannot handle too much rain which cause the rivers to quickly flood.

# MARKET OUTLOOK

**MARKET ALERT**

**Cauliflower**



SUPPLY  
GOOD  
QUALITY  
GOOD

Supplies have improved this week. Market pricing has also improved. Very good demand continues for Cauliflower this week. Market pricing improved since last week. Better yields are being harvested at this time. (F.O.B pricing for this week \$20.10 - \$23.25)

**Celery**



SUPPLY  
GOOD  
QUALITY  
FAIR

Supplies are steady for next week. Quality has been reported as only fair at this time due to hot days and rain. Supplies are currently coming from Salinas CA and Santa Maria CA. Expect market pricing to escalate going into next week as supplies begin to wind down. Other local market is starting to wind down. (F.O.B pricing for this week \$11.65 - \$13.10)

**MARKET ALERT**

**Citrus**



SUPPLY  
FAIR  
QUALITY  
FAIR

**Limes: RADAR** Excessive rain continues to impact Martinez, Mexico, with tropical storm "Karl" heading towards Veracruz. Depending on severity at landfall, including the amount of precipitation and wind speed, impeding damage could impact production in January. Presently, the storm will limit crossings this week and may cause pricing to increase for the interim. Coloring and overall shelf life has begun to upon introduction of the new crop. However, conditional defects in the form of styler end breakdown and oil spots continue to impact the fruit due to inclement weather and will continue to be representative given this week's rain events. The crop is currently peaking on small fruit; mid-sized fruit yields are increasing; large sizes (esp. 110's) remain scarce.

**Lemons:** The overall crop set is lighter this season in D1. With new planting in progress, this will put the volume about 15-20% more than last season. In most years new trees produce large lemons but with the lack of water it is looking to be more of 140/115 peak this season. The overall fruit quality looks good, seeing good shape and texture so far. California will start in a few weeks.

**Oranges: ALERT (CA Oranges)** There will be a gap on California oranges this season as Valencia's is expecting to be done the last week of September and domestic navels starting October 20<sup>th</sup> if color and brix testing is allowed. Florida is expected to start the first week of October. Looking to be about 15% less than a normal year but is not terrible and can help to keep the market strong. Right now, fruit in the field is small, heavy to 88's and smaller. Due to the high heat and lack of water, it is not growing right now. Fruit size will come once there are some rains, but it's hard to say when. 72's and larger will be tight until mid- to the end of December. Something to keep in mind, FL can start running Navels October 10<sup>th</sup> if there is a market for them. Sizing could be 56/48/64's, which may be a great option if California has a lack of large sizes in the front side of the season. The late Navel crop is light as an industry, which could possibly be a short season.

**Corn**



SUPPLY  
GOOD  
QUALITY  
GOOD

Prices for Corn is trending down this week. Volumes for corn are picking up out of the East and West at the same time demands are generally weak. Growers are making deals on Bi-Color Corn.

# MARKET OUTLOOK



**MARKET ALERT**

**Cucumbers**



SUPPLY  
GOOD  
QUALITY  
FAIR

**Slicing:** Prices for Slicing Cucumbers are trending up slightly this week. Production is picking up out of Georgia, but growers are reporting higher than usual challenges with quality.

**English & Persian: EXTREME—FORCE MAJEURE** Prices for Persian Cucumbers are trending mostly stable this week. Prices for English Cucumbers are normalizing. The production for Persian Cucumbers were drastically impacted by disease in Canada. Production out of Mexico has been reduced by rain. Look for the markets to be elevated for the unforeseen future.

**MARKET ALERT**

**Eggplant**



SUPPLY  
FAIR  
QUALITY  
FAIR

Prices for Eggplant are trending up this week. Supplies are extremely tight. Wind plus Rain on the East Coast and Mexico is impacting production and quality.

**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

Import Ginger continues getting a little thin due to the increase of overall cost to import and some delay at port.

**Grapes**



SUPPLY  
GOOD  
QUALITY  
GOOD

Weekly shipments are down about a Million cartons when comparing the last 4 to 5 weeks this year against last. In total, the industry is behind last year by about 1.5 million cartons. These are concerning numbers, if for no other reason, the extreme heat, rain and historically very high humidity will likely lead to fruit having less storage life and shelf life. Especially so with growers struggling to find "GOOD" and "EXPERIENCED" labor. Green Seedless: Currently offered from as low as mid-teens to as high as mid-thirties. Great Green typically being offered at the lower end of the range and Autumn Crisp at the upper. This is about as wide a range of FOB pricing we have ever seen. As we head towards mid-October, we get closer to the start of the Southern Hemisphere grape harvest. Peru is expected to ship more fruit to the USA at the front end of the deal this year than last. Our expectations are that we should see early engagement on Imports from the retail trade in December, so having fruit on hand should make for a smoother transition from California to Imports with far fewer interruptions on the front end due to lack of supply. All in all, we are cautiously optimistic regarding Imported Grape sales in December and January.

# MARKET OUTLOOK



## Herbs



SUPPLY  
LIMITED  
QUALITY  
POOR

**Basil:** Colombia production and quality continues to be an issue due to all the rain. Quality out of Mexico is good.

**Chervil:** Supplies continue to be light with day-to-day availability due to the heat in Mexico and the domestic growing regions.

**Cilantro:** **ALERT** Supplies will continue to be very short this week. Quality will only be fair going into next week. Most growers will be shipping out of Salinas CA and Santa Maria CA. Previous rains followed by extreme hot weather has affected yields. (\$20.95- \$24.90)

## Honeydews



SUPPLY  
FAIR  
QUALITY  
GOOD

California is finishing up. Arizona and Mexico production has started. Demand is down and supplies are light. Sizing is mixed between 5/6ct with some jumbos. Brix level are being reported as good.

**MARKET ALERT**

## Iceberg



SUPPLY  
LIMITED  
QUALITY  
POOR

**EXTREME ALERT** Supplies continue to be extremely short for next week. Overall quality has been reported as less than fair at this time. Weights are expected to be very light next week. We are experiencing some quality issues at field level due to virus and weather. The presence of INSV and Sclerotinia continue to be present. (F.O.B pricing for this week \$59.30- \$60.30)

## Kale



SUPPLY  
GOOD  
QUALITY  
GOOD

Supplies continue to be very good this week. Demand is down on Green Kale for this week. Good quality has been reported at this time. Supplies should remain steady for a few weeks. Market pricing is improving. (F.O.B pricing for this week (\$11.45 - \$12.65)

**MARKET ALERT**

## Leaf



SUPPLY  
LIMITED  
QUALITY  
POOR

**Green & Red Leaf:** **EXTREME ALERT (Green Leaf)** Supplies will continue to be extremely short this week. Quality will be less than fair. Warm weather and rain have affected yields, crops are affected by Virus and disease. Market pricing will continue to stay escalated going into next week. Growers are having multiple quality challenges at Field Level. (Green Leaf F.O.B pricing for this week \$51.95 - \$53.80)(Red Leaf F.O.B pricing for this week \$33.20 - \$33.85)

**Romaine:** **EXTREME ALERT** Supplies will continue to be extremely limited for next week. Overall quality continues to be a challenge. We continue fighting INSV in the Romaine fields. Carton weights will be light. Romaine heads will also be on the smaller size. (Romaine pricing for this week \$49.35 - \$50.75) (Romaine Hearts pricing for this week \$51.75 - \$53.55)

**Tender Leaf:** Supplies continue to be steady going into next week. Demand continues to be good, quality has been reported as fair for now. Supplies will remain steady for a few weeks. Experiencing some rains and warm weather may cause some future quality issues with baby tender greens such as mildew. (F.O.B pricing for this week \$4.65 - \$4.75)

# MARKET OUTLOOK



<p><b>MARKET ALERT</b></p> <p><b>Mushrooms</b></p>  <p><b>SUPPLY</b> SHORT</p> <p><b>QUALITY</b> FAIR</p>	<p><b>Shitake Mushrooms:</b> 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.</p> <p>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.</p>
<p><b>MARKET ALERT</b></p> <p><b>Onions</b></p>  <p><b>SUPPLY</b> FAIR</p> <p><b>QUALITY</b> GOOD</p>	<p>Onions are coming out of Colorado, Idaho, Oregon, Utah, and Washington. All sizes and colors are available. Quality has been good. Demand is steady. Pricing is trending down some. Majority of the growers are done harvesting and have their onions in storage. Planting for 2023 season has started but it seems the overall acreage will be down due to the water shortage.</p>
<p><b>MARKET ALERT</b></p> <p><b>Onions Green</b></p>  <p><b>SUPPLY</b> SHORT</p> <p><b>QUALITY</b> FAIR</p>	<p><b>EXTREME ALERT</b> Supplies continue to be very short this week. Market pricing will continue to be escalated going into next week. Green onions are coming from Mexico. Shortage of labor is also adding to limited harvest affecting supplies. We had some recent excess rains in Mexico that has caused some damage to recent crops. (F.O.B pricing for this week \$36.68-\$38.25)</p>
<p><b>Pears</b></p>  <p><b>SUPPLY</b> GOOD</p> <p><b>QUALITY</b> GOOD</p>	<p>The Pacific NW organic pear crop looks promising, as estimates point to an increase in volume over last year. Most organic varieties are seeing volume increases, which is welcome in a year where 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 NW pear crop is estimated to be slightly up year-over-year, further strengthening the organic pear category. The crop will continue harvesting through October and into early November, pending geography and variety.</p>
<p><b>MARKET ALERT</b></p> <p><b>Peppers Bell</b></p>  <p><b>SUPPLY</b> FAIR</p> <p><b>QUALITY</b> FAIR</p>	<p><b>ALERT (Red &amp; Yellow)</b> Prices for Green and Red Bell Peppers are trending up this week. Prices for Yellow Bell Peppers are stable. Pricing for Red and Yellow peppers is elevated. Growing areas out of the East are currently transiting South. Look for volatile markets until production out of Georgia gets fully up and running.</p>
<p><b>MARKET ALERT</b></p> <p><b>Peppers Chili</b></p>  <p><b>SUPPLY</b> FAIR</p> <p><b>QUALITY</b> FAIR</p>	<p><b>ALERT (Chili Peppers &amp; Tomatillo)</b> Prices for Chili Peppers are mostly stable this week. Production was not impacted in Georgia. Production out of the West and Mexico is steady.</p>

# MARKET OUTLOOK

## Pineapples



SUPPLY  
FAIR  
QUALITY  
GOOD

We are still feeling the effects of the Natural Flowering portion of the year, which gives us a higher % of smaller fruit. Couple that with the effects of La Nina and the results are not favorable. The volume on 5cts and 6cts are limited and to ensure supply, would suggest that all customers move to 7s or 8s to get product. This situation will go on for the next few weeks. This will be the case for all grower shippers of pineapple from Costa Rica.

### MARKET ALERT

## Potatoes



SUPPLY  
LIMITED  
QUALITY  
FAIR

Potatoes are being harvest in Colorado, Idaho, Nebraska, North Dakota, Washington, and Wisconsin. Quality is nice. Prices for potatoes are trending down to being normal on the small sizes but still elevated on the bigger size. Big potatoes are still high and tight, recommend flexing size to smaller size. Overall acreages are down slightly compared to previous year. This will affect precut as well.

### MARKET ALERT

## Squash



SUPPLY  
FAIR  
QUALITY  
FAIR

Prices for Yellow and Zucchini Squash are trending up this week. Production is currently working its way down the East Coast to Georgia. Growers are reporting some wind scaring due to Hurricane Ian.

### MARKET ALERT

## Strawberries



SUPPLY  
FAIR  
QUALITY  
FAIR

Prices for Strawberries are trending up this week. Growers are reporting fair quality due to heat and rain. Packing crews are putting extra efforts into grading out poor-quality fruit.

### MARKET ALERT

## Tomatoes



SUPPLY  
BAD  
QUALITY  
FAIR

**FORCE MAJEURE** Prices for all Tomatoes are trending up this week. Growers in the East are still working through the impact of Hurricane Ian. California is working through heat and Rain. Mexico is working through the impact of Hurricane Kay. Look for the markets to be extremely tight and prices to be near record levels for the unforeseeable future. This will affect precut also.

## Watermelons



SUPPLY  
FAIR  
QUALITY  
GOOD

Supplies on Seedless and minis continue to be a little tight. Light supplies are coming from Arizona, California, Nogales, North Carolina, South Carolina, and Texas. Mexico is starting up out of Edinburg and Nogales for fall. Florida Fall crop has been wiped out from Hurricane Ian. Quality has been good.



# MARKET OUTLOOK

## Western water on the precipice

October 13, 2022

Low water supplies in the Western United States have reached a desperate situation. As replenishing rain will not fall, civic and business leaders are stepping up to ease the situation as much as possible.

Mark Twain observed: "Whisky is for drinking - water is for fighting."

This is a favorite quote used by Dennis Nuxoll.

Few have a greater grasp of water's value than Nuxoll, who works from Washington, DC, as vice president, federal government affairs, for the Western Growers Association. WGA, headquartered in Irvine, CA, is at the forefront in addressing the water crisis in California and the Colorado River Basin. Nuxoll is the point of that spear.

"We're on the precipice of really drastic stuff," he tells Fresh Fruit Portal.

WGA is working not only on the Federal level, but with state legislatures in California, Arizona and many other entities to address this critical and highly complex situation.

The Federal government has recently appropriated \$12 billion under two separate bills for projects to improve water management in the West. More on that, below.

"For me it's an all-hands-on-deck moment," Nuxoll emphasizes. "That's certainly the case in the Colorado River Basin. In one or two years, if the water levels continue to drop, hydroelectric turbines won't spin at lakes Mead and Powell. Los Angeles will not only have a problem with no water, but no electricity."

Meanwhile, as many as 500,000 acres of agricultural land in California's Central Valley may go fallow because of a lack of irrigation water.

For good, practical reasons, agriculture has always had senior water rights in the western U.S. "We use a lot of water to grow food." As the water supplies are rapidly shrinking agriculture still is first in line.

Still, for water management discussions, "urban folks need to be involved too. We may say, 'You're not allowed to have a grass lawn. Or, if it gets really tight, maybe you can't have golf courses. That would bring a revolt from retirees in Arizona! I'm half joking but if you can't grow food, you don't need a lawn.'" Nor a golf course.

Nuxoll says agriculture and cities and towns must collaborate on comprehensive management plan. All must save water. "But having farmers save water so someone else can use it isn't sufficient. It has to be more than that."

As growers receive less irrigation water, economics will and already have started forcing new crop selections.

If land is fallowed in the Colorado River Basin and California, it is the lower value crops that growers will choose to stop producing. Water that has produced field-grown crops will go to orchard crops. "Almonds use more water but they're a higher value crop," Nuxoll notes.

### Recent drought history

After a long drought, California had a good spell of water for one or two years. But over the last four years, California has been in another drought.

Nuxoll says that, generally, the Colorado River Basin has been dry for 15 or 20 years. The Rio Grande River has been under-replenished for the last 25 or 30 years. The Pacific Northwest has had a two- or three-year drought.

"The entire Western U.S. is in bad shape. We have to create more efficient irrigation for our farms."

To answer this crisis, the Federal government created "two pots of money" totaling \$12 billion. These two huge resources represent short-term and long-term plans, Nuxoll explains.

Over the next four years, \$4 billion will be spent from the Inflation Reduction Act for a short-term answer to address the drought crisis on the Colorado River, and boost Lake Mead and Lake Powell. The Department of the Interior is running this program, which specifically funds water management and conservation efforts in the Colorado River Basin and other areas experiencing similar levels of drought.

According to the Department of the Interior, it will...

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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](mailto: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

