



# 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. 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's continues to harvest strong volumes, with available orchards increasing. Last week the volume harvested/packed/shipped into the US was up 5% compared to the week prior and was around 55 million pounds. Current US inventory is up around 4% compared to the week prior at around of 64 million pounds. Mexico's market share is up to 92% as Peru drops to a bit over 7% of the supply. California fruit is trickling in and is just under 1% of the volume when combined with avocados from Colombia. Peru 48 programs ending shifted demand back into Mexican and California 48s were in a demand slightly exceeds supply position again last week, this trend did put an upward pressure on Mexico's field prices. This week heavy harvest volumes in Mexico so far have softened prices ever so slightly. Peru is still feeding some programs so there is demand yet to return to Mexico in coming weeks. 60s and smaller as well as XLs offer promotional opportunities. 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 up this week. Tight supplies out of Mexico due to weather.

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

**Raspberries:** Prices for Raspberries are trending down this week. Good supplies and quality out of Mexico.

# MARKET OUTLOOK



**MARKET ALERT**

**Beans**



SUPPLY  
FAIR  
QUALITY  
FAIR

**Green Beans:** **ALERT** Beans are starting to transition south with some quality issue. Hurricane Ian had cause power outages to some packing facility, causing supplies to be limited. Availability continues to be day to day on the West Coast along with some quality issue.  
**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 this week to be very limited. Demand was strong for Broccoli this week. Passed rains and Hot weather has created Pin Rot in Broccoli. Market pricing is expected has escalated since last 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 \$33.15 - \$34.15)

**Brussels Sprouts**



SUPPLY  
GOOD  
QUALITY  
GOOD

Supplies continue to be steady this week. Quality is 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. (F.O.B pricing for this week \$20.65 - \$21.45)

**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. Rains and extreme hot weather has caused some issues with yields. Expect market pricing to remain escalated going into next week. (F.O.B pricing for this week \$25.45 - \$26.85)

**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

Daily production has been declining in California. California will be finishing up in a few weeks, then it will transition to Yuma, which will run through mi-November. Import melons are expecting to arrive the second week of November.

# MARKET OUTLOOK

**MARKET ALERT**

**Cauliflower**



SUPPLY  
LIMITED  
QUALITY  
POOR

Supplies will continue to be limited this week. Market continues to be active. Very good demand for Cauliflower this week. Passed rains and Hot weather is causing mold on the Cauliflower. Market pricing increased last week; we should expect for pricing to remain strong for next week. Supplies out of Mexico continue to be short. (F.O.B pricing for this week \$32.05 - \$33.00)

**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 \$11.55 - \$13.05)

**MARKET ALERT**

**Citrus**



SUPPLY  
FAIR  
QUALITY  
FAIR

**Limes:** The market continues to lose momentum as costs decline in Mexico. The price on small fruit has just about bottomed out; the price on large sizes will continue to decline until a cost threshold is reached and the market attains stability. Coloring and overall shelf life are beginning to improve as the new crop is harvested. However, conditional defects in the form of styler end breakdown and oil spots continue to impact the fruit due to inclement weather, including consistent rain events paired with high temperatures and humidity. Overall availability will ramp up as October progresses, which is expected to continue through November. 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  
FAIR  
QUALITY  
GOOD

Prices for Corn are trending down this week. Some Eastern growers are making deals on Bi-Color Corn. Production is transiting down from the Northeast to the Southeast. For the West, California is winding down as production moves to Arizona.

# MARKET OUTLOOK



**MARKET ALERT**

**Cucumbers**



SUPPLY  
GOOD  
QUALITY  
FAIR

**Slicing:** Prices for Slicing Cucumber are trending down this week. Theirs decent supplies out of Georgia and the Carolina's. Look for the impact of Hurricane Ian to hit the Florida crop in late October.

**English & Persian: EXTREME—FORCE MAJEURE** Prices for English Cucumbers are trending slightly down this week. Prices for Persian Cucumbers are trending slightly up this week. The production for English and 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. Supply is Poor and Quality is Fair.

**MARKET ALERT**

**Eggplant**



SUPPLY  
FAIR  
QUALITY  
FAIR

Prices for Eggplant are trending up this week. Wind and Rain in 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:** **EXTREME 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. Recent rains followed by extreme hot weather has affected yields. (\$30.25- \$31.45)

## Honeydews



SUPPLY  
SHORT  
QUALITY  
GOOD

**RADAR** Honeydews remain tight on all sizes with no relief in sight until Mexican deal starts crossing in mid-October. Daily production has been declining.

**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 \$36.50- \$37.50)

## 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 only be fair with signs of fringe burn and mildew. Warm weather and rain have affected yields and added quality issues at field level. Market pricing will continue to stay escalated going into next week. Growers are having multiple quality challenges at Field Level. (F.O.B pricing for this week \$48.75 - \$49.15)(Red Leaf F.O.B pricing for this week \$23.35- \$24.40)

**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. Rain and Hot weather have created multiple quality issues greatly affecting yields. Carton weights will be light. Romaine heads will also be on the smaller size. (Romaine pricing for this week \$34.45- \$34.90) (Romaine Hearts pricing for this week \$39.90 - \$42.00)

**Tender Leaf:** Supplies continue to be steady going into next week. Demand continues to be good, quality is 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



**MARKET ALERT**

**Mushrooms**



SUPPLY

SHORT

QUALITY

FAIR

**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.

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

Onions are coming out of Colorado, Idaho, Michigan, North Dakota, Oregon, Utah, Washington, and Wisconsin. All sizes and colors are available except for a few colossal.

Quality has been good. Market is holding steady. Growers are wrapping up harvest in the next week and getting product into storage. Demand is steady.

**MARKET ALERT**

**Onions Green**



SUPPLY

SHORT

QUALITY

FAIR

**EXTREME ALERT** Supplies continue to be short this week. Market pricing will continue to be escalated going into next week. Green onions are coming from Mexico. Growers in Mexico are experiencing extreme limited supplies due to young plants dying caused by an extreme heat wave that lasted two weeks in late July. Shortage of labor is also adding to limited harvest affecting supplies. Some good news, there is a slight improvement in supplies. (F.O.B pricing for this week \$33.45- \$36.75)

**Pears**



SUPPLY

GOOD

QUALITY

GOOD

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.

**MARKET ALERT**

**Peppers Bell**



SUPPLY

FAIR

QUALITY

FAIR

**ALERT (Red & Yellow)** Prices for Bell Peppers are trending slightly higher this week. The markets firmed up a bit due to the impact of Hurricane Ian. Production out of Georgia saw rain and wind. Look for the markets to tighten up in November or December due to the damage in Florida.

**MARKET ALERT**

**Peppers Chili**



SUPPLY

FAIR

QUALITY

FAIR

**ALERT (Chili Peppers & Tomatillo)** Prices for Chili Peppers are mostly stable this week. Production was not impacted in Georgia. Production out of the West and Mexico is steady.

# 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.

### MARKET ALERT

## Squash



SUPPLY  
FAIR  
QUALITY  
FAIR

Prices for Yellow and Zucchini Squash are trending up this week. Production out of Georgia was impacted by high winds associated with Ian. Growers out of Mexico are starting to ramp up on production. Florida will be impacted by Ian in the months to come. Please check arrives for quality issues.

### MARKET ALERT

## Strawberries



SUPPLY  
FAIR  
QUALITY  
FAIR

Prices for Strawberries are trending up this week. Supplies are tight as usual for this time of year. Fruit is starting to cross from Mexico. It is recommended that turns on strawberries be kept tight as possible.

### MARKET ALERT

## Tomatoes



SUPPLY  
FAIR  
QUALITY  
FAIR

All tomatoes are trending up this week. The market has tightened up significantly from the impact of Hurricane Ian and associated rains in the East. Mexico has been impacted by rain, hail, and earthquakes. Hurricane Kay and Ian will affect the markets during the months to come. Look for tight supplies during the unforeseeable future.

## Watermelons



SUPPLY  
FAIR  
QUALITY  
GOOD

Supplies on Seedless and minis continue to be a little tight. Light supplies are coming from Arizona, California, Delaware, Indiana, North Carolina, South Carolina, and Washington. Mexico is starting up out of Edinburg and Nogales for fall.



# MARKET OUTLOOK

## Citrus industry appears to be Florida ag's biggest Ian casualty

October 05, 2022

Within the Sunshine State's produce industry, it is Florida's citrus growers facing devastating damage from Hurricane Ian.

In recent days since Sept. 28, when Ian struck southwest Florida, reports from the state's vast agricultural industry have been emerging. Of course, the hurricane not only flooded gulf-side resorts, such as Ft. Myers, but the vegetable production areas of the Everglades. Ian, the rain and wind maker, also certainly roared through Florida's southwest and central citrus and vegetable producing areas.

### Field crop planting was largely just beginning

On Oct. 4, The Ledger in Lakeland, FL, quotes Christa Court, economist and director of the Economic Impact Analysis Program for the University of Florida Institute of Food and Agricultural Sciences (UF/IFAS): "It so happens, that Hurricane Ian's arrival coincides with the usual timeframe for plantings of most crops in the region. The crops in harvest now include avocado, oranges, grapefruit, carambola, corn, peanuts, and sweet potatoes."

Ian hit growers in the early stages of the 2022-2023 season. The first monthly forecast of the season from the U.S. Department of Agriculture is set for Oct. 12, The Ledger notes.

Court continues: "After the storm passes, assessing the damages might not be a quick process, depending on power and telecommunication outages, limited access to farms and ranches due to flooding, and other challenges. Other effects might only appear in the long-term, including problems like soil salinity affected by storm surge along the coast."

The Ledger credits UF/IFAS for indicating seasonal crops currently in Florida ground include over 200,000 acres of fresh market vegetables, like cucumbers, peppers, and tomatoes, over 180,000 acres of hay and 95,000 acres of field crops, like sugarcane, cotton and peanuts, officials with said. Most of the land – over three million acres – is grazing land.

IFAS estimated Sept. 28 that Ian might affect 375,000 acres of citrus groves.

Strawberry grower Nick Wishnatzki, public relations manager of Wish Farms, Plant City, tells The Ledger, "Fortunately, we held off planting as we were waiting to see Ian's path. Around 10-15% of the plastic beds were ripped up, a few fields were completely submerged under water, and dirt was blown into the fields changing some of the grading."

"Our situation pales in comparison to other folks," Wishnatzki says. His strawberry farm (G&D Farms) in Duette, Manatee County, sustained some damage from the wind and rain from Hurricane Ian. In Duette, "There will be additional costs to get back on track, but we don't foresee any significant delay to the Florida season getting underway in November."

### Florida citrus

On October 3, WFSU reported online, "As they begin to assess groves damaged by Hurricane Ian, Southwest Florida citrus growers are seeing conditions potentially worse than after Hurricane Irma, which played a key role in citrus production falling by more than one-third in 2017."

Matt Joyner, executive vice president and CEO of Florida Citrus Mutual, said Sept. 30 told WFSU that it might be more than a week before Ian's impacts are fully known. At the time, Joyner said growers in DeSoto, and Hardee counties still had fields underwater.

But Joyner says initial discussions with citrus growers make him "feel like this is going to be, for them, worse than Irma. Folks are trying to get water off their trees to the extent that they can pump water off, although in a lot of instances there's just no place to send it."

Joyner relates that, in driving to reachable groves, he saw quite a bit of fruit on the ground....



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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