



WEEK 47: November 15 - November 21, 2021

MARKET OUTLOOK

Regional Weather Update :

Oxnard, CA: Partly cloudily early in the week then sunny with highs in the upper 60s to 70s and lows in the mid 50s.

Salinas, CA: Partly cloudy all week with highs in the upper 60s and lows in the high 40s to low 50s.

Yuma, AZ: Sunny Monday then Partly Cloudily the rest of the week with highs in the 80s and lows in the upper 50s.

Immokalee, FL: Sunny first part of the week than partly cloudy with a 40% chance of rain on Friday highs in the 80s with lows in the high 50s to low 60s.

Idaho Falls, ID: Partly cloudy with highs in the 40s to 50s and lows in the high 20s to mid 30s.

Transportation:

National Diesel Average : \$3.73 Compared to Last Year: \$2.38

Shortages : Seeing high freight rates, with **extreme** shortages remain in CO, ID, MN, E. NC, ND, WA, & C. WI **slight** shortage in: AZ, CA, FL, GA, ID, MI, OR, & S. TX

MARKET ALERT

Broccoli Crowns & Florets

Cabbage, Green

Celery

Cilantro

Corn

Garlic

Lettuce, Iceberg , Leaf & Romaine

Mushrooms, All are under an Extreme alert

Onions, Green, Red, Yellow, & White

Peppers, Chili

Potatoes

Romaine & Romaine Hearts

Strawberries

Tomatoes: 20 & 25 LB. Rounds & Romas



MARKET OUTLOOK

Apples



SUPPLY
FAIR
QUALITY
GOOD

Most of the varieties are being harvested on the new crop of apples out of Washington. The impact of the heat wave in Washington certainly was a negative on the overall size and storability. Expectations at this point are for a crop similar to last season, but without the family box program, it could represent better numbers especially until the end of this crop. The quality of the fruit so far looks good.

Asparagus



SUPPLY
FAIR
QUALITY
GOOD

Mexican volume has come off this week and some marketers have started to quote higher prices with the Thanksgiving pull starting next week. This trend should continue for the next two to four weeks until Northern Caborca starts to cut fern. Volume from Peru (Trujillo/Ica) remains strong. Some growers have closed fields due to market conditions. As of today, markets remain weak and less active due to the unchanged volume from Peru.

Avocados



SUPPLY
FAIR
QUALITY
GOOD

Last week was a holiday in Mexico and we are seeing lighter crossings. Market pricing was fairly steady last week, and we saw some increases on big fruit, but small fruit seems unaffected by the 'rain market'. If harvest remains strong, we may see decreased field pricing in two weeks. The size curve percentages remain mostly unchanged – the crop continues to be strong on 60s and smaller while large fruit remains tight. October ended with the market higher than anticipated, and November is starting higher than the previous 6 years. Most believe this market should have cooled off by now, but between field prices and inflation, demand remains strong particularly in the foodservice arena.

Bananas



SUPPLY
GOOD
QUALITY
GOOD

Banana quality and availability are good at this point, however the cost to get said bananas is up.

Berries



SUPPLY
GOOD
QUALITY
GOOD

Blackberries : Prices for Blackberries are trending down this week. Growers out of Mexico are working through rain related challenges at this time. Production is expected to increase over the next few weeks. Demands are expected to increase too as we get closer to Thanksgiving.

Blueberries : Prices for Blueberries are trending down this week. Product out of Peru & Mexico is filling up the pipeline. Growers are expecting stable supplies & prices for the next few weeks.

Raspberries : Prices for Raspberries are steady this week. Growers are currently reporting rain related challenges. Growers out of Mexico are forecasting increased volumes during the next few weeks. The extra volume will be needed for Thanksgiving.

MARKET OUTLOOK

Beans, Green



SUPPLY
TIGHT
QUALITY
FAIR

Markets remain firm and supply lighter this week out of Georgia and South Florida, mostly weather related. Quality in the east, has been marginal due to rain and volume expected to be light for the holidays. In the west we are seeing volume ramp up out of the desert and should see a few crossings out of Nogales late next week. We do not expect pro-rates, however, we recommend subbing to French beans or soft squash if needed.

MARKET ALERT

Broccoli



SUPPLY
FAIR
QUALITY
GOOD

Supplies continue to be limited this week. Most growers will be shipping from Yuma next week. Quality is only fair at this time, supplies will be limited for another week. Growers are expecting for better supplies coming out of Yuma AZ. (F.O.B pricing for this week \$23.00 - \$24.00)

Brussels Sprouts



SUPPLY
GOOD
QUALITY
GOOD

Supplies continue to be good this week. Demand has actually increased with the Holidays around the corner. Growers are reporting better quality. Supplies are expected to continue improving the next few weeks. (F.O.B pricing for this week \$24.45 - \$25.20)

Carrots



SUPPLY
FAIR
QUALITY
GOOD

Some fields are finishing the crop in the Imperial Valley. Partial shortages might occur with jumbos this week and the front part of next week. Next crop out of Kern County should have good size and going forward with no supply issues

Cauliflower



SUPPLY
GOOD
QUALITY
GOOD

Supplies have improved this week. Market pricing is improved this week. Most Growers will be shipping out Yuma next week. Overall quality is good. Supplies are expected to be steady for a couple of weeks. (F.O.B pricing for this week \$11.90 - \$12.98)

Cantaloupes



SUPPLY
FAIR
QUALITY
GOOD

Domestic cantaloupe availability from the desert remains very low but beginning next week we will finally have other options. The 2021/2022 import season will start with arrivals starting Monday 11/15 in Florida. The harvest has started in Guatemala. Initial quality reports have us very excited for the first arrivals as growing conditions have been ideal thus far within the region. Melons are solid with very good internal quality characteristics. Sizing should primarily lean towards 9/9Js with a decent percentage of 12s also in the mix.

MARKET OUTLOOK

MARKET ALERT

Celery



SUPPLY

FAIR

QUALITY

GOOD

Supplies will continue to be light this week. Salinas has finished with Celery. Supplies are expected to be short until we fully transition to Yuma mid December. Celery will be moving to Oxnard CA after the Salinas season. (F.O.B pricing for this week \$16.10 - \$16.25)

MARKET ALERT

Corn



SUPPLY

BAD

QUALITY

POOR

Prices for Corn are trending down a bit this week but supplies are still very tight. White Corn is available out of the West as very high prices. Corn out of the East is available. The price is lower compared to Western product but at the same time Eastern Corn is very tight. The markets should see some relief as production out of Florida increases after the Thanksgiving Holiday passes later this month.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Cucumbers is trending up this week. Volume out of Georgia is declining while volume out of Florida is picking up. Growers out of Nogales are reporting good numbers. Look for the markets to tighten up prior to the Thanksgiving Holiday.

Eggplant



SUPPLY

FAIR

QUALITY

GOOD

Prices for Eggplant are trending down this week but is expected to turnaround prior to Thanksgiving. Production is coming out of Georgia, California and Mexico. Harvesting out of Florida is expected to start later in the month.

Grapes



SUPPLY

GOOD

QUALITY

GOOD

There is very little chance of rain despite the cloudy and cool weather in both the Northern and Southern San Joaquin Valley. Growers have resumed harvest and the windy cool weather following last week's rains helped minimize the negative impact on grape supplies. Growers focused their harvest and recovery efforts on the best grapes leaving smaller and lighter color red grapes behind. We saw the lower end markets firming up. Most of the CA harvest will be completed by the end of the mid November.

Honeydews



SUPPLY

FAIR

QUALITY

FAIR

Honeydew production remains short on domestically grown melons but a good supply of Mexican production has been crossing through Nogales. Sizing continues to be mostly 5s and larger with some 6s showing available. Very few 8s are coming to market.

MARKET OUTLOOK



Extreme Market Alert

Iceberg



SUPPLY
SHORT
QUALITY
POOR

Supplies will continue to be very short this week. Most growers will be shipping out of Yuma next week. Overall quality is only fair at this time. We should not have the presence of the INSV virus in Yuma AZ. Weights will be on the lighter side until supplies improve. Better supplies are expected once growers get harvesting in Yuma AZ. (F.O.B pricing for this week \$46.65 - \$47.65)

Extreme Market Alert

Leaf



SUPPLY
SHORT
QUALITY
POOR

Romaine: Supplies will continue to be short this week. Most growers will be shipping from Yuma next week. Overall quality is less than fair. We should not have the presence of the INSV virus in Yuma. Weights will be on the lighter side until supplies improve. Supplies will be better once growers start to harvest next week. (Romaine pricing for this week \$33.61- \$34.05) (Romaine Hearts pricing for this week \$37.00 - \$40.00)

Green & Red Leaf Lettuce: Supplies continue to be very short this week. Most growers will be shipping out of Yuma next week. Supplies will continue to be limited for another week or two. Quality is only fair at this time (F.O.B pricing for this week \$13.05- \$30.55)

Tender Leaf: Supplies continue to be excellent 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)

Lemons

& Limes



SUPPLY
FAIR
QUALITY
FAIR

LIMES: Costs continue to increase in Mexico, outpacing the U.S. market. In response, overall crossings and availability are expected to decline until pricing reaches compatibility. As we transition to the new production cycle, lower yields are expected over the next few weeks. Peak sizing will soon shift to small fruit & large sizes will become scarce.

LEMONS: Overall volume is declining as some groves prepare to end production for the season. The crop is currently yielding a greater proportion of choice-grade fruit vs. fancy, so we can expect to see a more-defined pricing spread over the coming weeks. Additionally, the crop is currently peaking on 115's, with **low volume present on small sizes** (235/200/165's). **Please consider altering your spec to complement crop trends.**

Extreme 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 took another small increase this week. There are few Super Colossal and Colossal sizes are available in mixer-quantities. Red Onions and white onion supplies are tight and will see increasing pricing over the next several weeks. Overall quality is good thus far. FOBs for are running for yellows around \$15, whites \$15-17, reds \$13-16, and Super Colossal \$20-23. Demand remains steady for this historic crop.

MARKET OUTLOOK



MARKET ALERT

Onions, Green



SUPPLY

Short

Supplies continue to be lower this week. Demand continues to be good, Quality remains good. Supplies are expected to be light for a few weeks. (F.O.B pricing for this week \$18.15 - \$18.28)

QUALITY

GOOD

Oranges



SUPPLY

FAIR

Looks to be a much smaller crop this season, the smallest crop we have seen in many years.

The volume looks to be normal with the early navel varieties but size is showing to be 88's and smaller with very little 56's and larger.

QUALITY

FAIR

As we move into December, volume goes down and sizes are larger.

Early varieties will be sized as 88/113/72's

Washington's start around the start of December and look to be 72/56/88's

Pears



SUPPLY

FAIR

The new harvest has begun in Washington. Some varieties are still available out of California but small sizes are very limited. There are imports available out of the East Coast.

QUALITY

FAIR

Peppers, Bell



SUPPLY

GOOD

Prices for Green, Red and Yellow Peppers are trending down this week. Production is coming out of California, Georgia and Florida. Volume from Mexico is just beginning. Volume out of Georgia is good this week but has been running hot and cold based on the weather. The markets are expected to tighten up prior to the Thanksgiving Holiday.

QUALITY

GOOD

MARKET ALERT

Peppers, Chili



SUPPLY

FAIR

Prices for Chili Peppers are trending up this week. Prices remain at elevated levels. Production is coming out of Georgia, Florida with lower volumes out of Baja and Central Mexico. Production out of Plant City Florida is getting ready to start. That will help relieve the markets a little but growers expect tight supplies through December.

QUALITY

GOOD

Pineapples



SUPPLY

FAIR

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.

QUALITY

GOOD

MARKET OUTLOOK

MARKET ALERT

Potatoes



SUPPLY
FAIR
QUALITY
GOOD

The potato markets continue to move up again this week on all sizes again, rather than just smaller size potatoes as it previously had been. The Norkotah crop does appear to be remaining on the larger end of the size profile for the foreseeable future. This is causing 80 ct. and smaller potatoes, as well as #2 potatoes, to get progressively tighter each week. Transportation continues to be a struggle with freight up and truck availability down. FOBs \$13-16 on all sizes. Demand will remain strong through the holidays and will only get worse in 2022.

Squash



SUPPLY
GOOD
QUALITY
GOOD

Prices for Green and Yellow Squash are trending up this week. Growers are reporting that demands aren't keeping up with production at this time. They've reduced production to help strengthen the markets. Look for tighter markets as we enter the Thanksgiving Holiday in just 2 weeks.

MARKET ALERT

Strawberries



SUPPLY
POOR
QUALITY
POOR

Prices for Strawberries continue to trend up this week. Supplies are tight due to crop transitions & rains. As expected, supplies are tight this time of year. Some relief is forecasted after the Thanksgiving Holiday as volume out of Mexico and Florida becomes a factor.

MARKET ALERT

Tomatoes



SUPPLY
FAIR
QUALITY
FAIR

Prices for all Tomatoes are trending down this week. 20 and 25 lb. Rounds have dropped significantly but prices are still elevated. The Roma market is still very tight and prices remain extremely elevated. Prices for Grape Tomatoes are back down to normal levels. Production is coming out of Florida, California & Mexico. Look for volatile markets leading up to the Thanksgiving Holiday. Growers are looking for supplies to improve after that.

LatAm industry commends multinational banana distributors for increasing prices

November 08, 2021

Banana groups from key Latin American countries have praised multinational distributors Fresh Del Monte, Dole, and Fyffes for increasing prices in the North American market.

Producers and exporters of Ecuador, Colombia, Guatemala, Honduras, Panama, Dominican Republic and Costa Rica, who on Oct. 27, 2021, signed the Great Regional Agreement for Shared Responsibility, requested that European, British and North American supermarkets to review the prices of bananas in accordance with the international reality of global cost increases and higher demands for sustainability.

"We highlight the initiatives set by Fresh Del Monte to increase its prices by USD 0.05 per pound, Dole an increase of USD 1.61 per box and Fyffes to increase of USD 1.60 per box for conventional bananas in the North American market," the Latin American Banana Cluster said.

"We expect similar reactions from the other markets to compensate for the overall situation according to the implications of the different particularities of each of these markets; only in this way will it be possible to maintain the true social and environmental objective that is sought with banana production."

The Cluster also urged consumers, supermarkets, importers and all those involved in the value chain to "act accordingly".

It said there must be an awareness of the impact caused by the different externalities and whose costs cannot be beared by the producers alone but must be shared by all the members of the value chain.

"Because if the necessary price increase is not forthcoming, the sustainability of bananas will be threatened," the Cluster said.

Latin American banana exporters have long complained about stagnant or even falling prices amid rapidly rising production costs.

[Latin American banana industry commends price rises \(freshfruitportal.com\)](https://freshfruitportal.com)

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

