

MARKET OUTLOOK



Apples



SUPPLY

FAIR

QUALITY

GOOD

This year apple crop is on the larger size and higher-grade fruit. Small and off-grade fruits will be on the tighter side for the entire season.

Asparagus



SUPPLY

FAIR

QUALITY

GOOD

Mexican production continues to be slow with less volume crossing each week due to the cooler weather, but larger sizes are improving. Peruvian production is good on all sizes and expected to continue through the mid-January. Markets is active with the Thanksgiving Holiday demand.

Avocados



SUPPLY

GOOD

QUALITY

GOOD

As Aventajada fruit matures, dry matter increases, and holding temperatures should be set at 42°F. The Loca crop is winding down, and Mexico will be fully in the Aventajada crop in a few weeks, with Normal on its heels – there's plenty of volume to carry us into the spring. Standing inventories are currently at 68.4 Mil lbs, which is roughly the same as a week ago. Jalisco continues to import 3.4 Mil lbs. for Week 45. The holidays are now upon us, and many items will compete for prime retail and promotional space. Avocado demand has historically lagged during the holiday season, but a recent increase in promotional activity has kept the commodity buzzing. There's plenty of volume to continue supporting promotions on your preferred sizing.

Bananas



SUPPLY

GOOD

QUALITY

GOOD

Banana is showing good quality and supply remains stable through the remainder of the year.

MARKET ALERT

Beans



SUPPLY

LIMITED

QUALITY

FAIR

Green Beans: **EXTREME ALERT** Beans out of South Georgia is tight. Florida production has started. Some growers have reported field losses as a result of Tropical Storm Nicole. Expect shortages and prorating as the Thanksgiving holiday approaches. Light volume with some quality issues out West. Market remains active. Demand has exceeded the supplies.

Snow Peas: California crop has started. Mexico supplies are steady with good quality. Production has improved from Guatemala.

MARKET OUTLOOK



Berries



SUPPLY
GOOD
QUALITY
GOOD

Blackberries: Prices for Blackberries are trending down this week. Production is picking up and is forecasted to peak in December.

Blueberries: Prices for Blueberries are trending slightly up this week. Production out of Argentina and Peru are done for the season. Volume out of Mexico is forecasted to pick up slightly during the next few weeks. Production out of Chile was impacted by rain and frost last week.

Raspberries: Prices for Raspberries are steady this week. Growers are expecting volume to pick up in the weeks to come.

MARKET ALERT

Broccoli



SUPPLY
FAIR
QUALITY
FAIR

EXTREME ALERT Supplies will be short this week. Strong demand continues for Broccoli this week. Market pricing continues to escalate and has reached most of our contract caps. Current supplies are coming from Salinas & Santa Maria. Supplies are also coming out of Mexico. (F.O.B pricing for this week \$48.65 - \$49.65)

Brussels Sprouts



SUPPLY
FAIR
QUALITY
GOOD

Supplies will be limited for this week. Quality is reported as good. Demand for Brussel Sprouts has increased. Market has increased and will continue as demand increases for Brussel Sprouts. (F.O.B pricing for this week \$30.45 - \$32.65)

Cabbages



SUPPLY
GOOD
QUALITY
GOOD

Supplies will be light for this week. Growers are reporting lower yields. Consecutive days with rain and cold weather has slowed down yields. Expect market pricing to possibly increase for next week. (F.O.B pricing for this week \$25.50 - \$26.50)

Carrots



SUPPLY
GOOD
QUALITY
GOOD

Supply is slightly stronger out of California going into Fall. For this time of the year this is expected due to seasonality and weather changes.

Cantaloupes



SUPPLY
FAIR
QUALITY
GOOD

Demand has exceeded the supply coming in from Guatemala. Until December, supplies will be limited. Sizing is mostly 9/9J follow by 12s. Sugar is just ok, but quality is nice.

MARKET OUTLOOK



MARKET ALERT

Cauliflower



SUPPLY
LIMITED
QUALITY
FAIR

EXTREME ALERT Supplies continue to be extremely limited for next week. Market pricing has escalated and has reached most of our contracted caps. Demand continues to be very good for Cauliflower this week. Supplies are currently coming from Salinas and Santa Maria. (F.O.B pricing for this week \$79.75 - \$82.45)

MARKET ALERT

Celery



SUPPLY
FAIR
QUALITY
FAIR

Supplies continue to be light this week. At this time, quality has been reported to be only fair. Supplies are currently coming from Salinas and Santa Maria. Market is expected to get stronger as demand starts to increase. Salinas is winding down, we will be transitioning to Oxnard. (F.O.B pricing for this week \$33.65 - \$34.45)

Citrus



SUPPLY
GOOD
QUALITY
GOOD

Limes: The market is expected to remain relatively stable throughout November before beginning to rise in December. We are seeing an increased distribution of mid-sized + large fruit. Demand trends are expected to increase, and costing should firm up as we approach the holiday season. Conditional defects in the form of styler-end breakdown and oil spots continue to impact the fruit due to recent inclement weather. In addition, consistent rain events over the past few months are expected to impact the bloom in January in terms of yields and quality. Pricing will certainly spike in January 2023, as it did in January 2022. Production supply chain disruptions are expected during the upcoming holiday season.

Lemons: California lemons has started with good quality. Mexico is wrapping up with limited supplies and quality is declining.

Oranges: California Navels season has started. The overall crop appears to be 15% lower than in a normal year. The Fukamoto variety is available until mid-December and fruit is running heavy to 88's and smaller, perfect for food service.

MARKET ALERT

Corn



SUPPLY
FAIR
QUALITY
FAIR

Prices for Corn are trending up out of the West and slightly down out of the East this week. Production has moved to Florida out of the East. Arizona is done and moving to California. Mexico is crossing low numbers, but volumes will pick up in the weeks to come.

MARKET OUTLOOK



Cucumbers



SUPPLY
GOOD
QUALITY
GOOD

Prices for Slicing Cucumbers are trending significantly down this week. Production is coming out of Florida and Mexico. Both are seeing higher production numbers.

Eggplant



SUPPLY
GOOD
QUALITY
GOOD

Prices for Eggplant are trending down this week. Production is up out of Georgia. Supplies are also coming out of Florida, California, and Mexico.

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

Grape quality is still inconsistent, with inferior grapes being placed into terminal markets. There are persistent reports of delays coming from Peru, which could have an impact on Red Grapes. Domestic and imported grapes will coexist on the market during the coming weeks.

Herbs



SUPPLY
GOOD
QUALITY
GOOD

All herbs from Colombia continues to have quality issue due to the rain. Mexico herbs are good in production and quality.

Chives: Chives has improved from Mexico.

Cilantro: Supplies will be light this week. Quality will only be fair going into next week. Most growers will be shipping out of Oxnard and Santa Maria. Yields have been affected by consecutive days of rains followed by cold weather. (F.O.B. pricing for this week \$22.15 - \$24.45)

MARKET OUTLOOK



Honeydews



SUPPLY
FAIR
QUALITY
GOOD

Guatemala honeydews are still in limited supply, but this is expected to change in early December. Most of sizing are 5/6s. Domestic honeydew is finishing up for the season. Brix level is good despite some external scarring. Mexican honeydew is available in Nogales. Demand is light. Both quality and brix level are good.

MARKET ALERT

Iceberg



SUPPLY
LIMITED
QUALITY
POOR

EXTREME ALERT Supplies will 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 going into next week. Some quality issues have been reported at field level due to virus and weather. The presence of INSV and Sclerotinia is still present. Expect extreme markets the next few weeks. A few growers have started their transition to Yuma. (F.O.B pricing for this week \$94.65 - \$95.65)

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 & Red Leaf) Supplies will continue to be extremely short for this week. Quality will be less than fair. Warm weather and rain has 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. Expect extreme markets for a few weeks. A few growers have started their transition to Yuma. (F.O.B pricing for this week \$88.15 - \$95.45)(Red Leaf F.O.B pricing for this week \$78.45 - \$80.15)

Romaine: EXTREME ALERT Supplies will continue to be extremely limited for next week. Overall quality continues to be a challenge. Growers continue fighting INSV in the fields. Carton weights will be light. Romaine heads will also be on the smaller size. Expect extreme markets for a few weeks. A few growers have started their transition to Yuma. (Romaine pricing for this week \$86.70-\$88.70) (Romaine Hearts pricing for this week \$94.15 - \$96.15)

Tender Leaf: EXTREME ALERT Supplies will be limited for this week. Demand has increased for tender greens due to higher prices on Lettuce commodities. Supplies will remain snug until we transition to Yuma. Experiencing some excess rains causing shortages with yields. Market pricing has escalated. Growers will be transitioning to Yuma this coming week. Supplies should improve. (F.O.B pricing for this week \$7.75 - \$9.75)

MARKET OUTLOOK



<p>MARKET ALERT</p> <p>Mushrooms</p> 	<p><u>SUPPLY</u> SHORT</p> <p><u>QUALITY</u> FAIR</p>	<p>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.</p> <p>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.</p>
<p>Onions</p> 	<p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>Onions are shipping out of Colorado, Idaho, and Oregon. All sizes and colors are available. Quality is reporting as good. Demand is good for the Thanksgiving holiday pull. Price is trending up. Yields are down, as are acres planted, compared to the previous year. Planting for 2023 season has begun, but it appears the overall acreage will be reduced due to the lack of water. Trucks are starting to get tight and freight cost are rising slowing. This will also have an impact on pre-cut.</p>
<p>MARKET ALERT</p> <p>Onions Green</p> 	<p><u>SUPPLY</u> SHORT</p> <p><u>QUALITY</u> FAIR</p>	<p>Supplies continue to be very limited this week. Market pricing will continue to be escalated going into next week. Green onions are coming from Mexico. Excessive rains in Mexico have caused some crop damage. Abnormal weather patterns have impacted crop yields in the growing regions. (F.O.B pricing for this week \$34.40 - \$36.40)</p>
<p>Pears</p> 	<p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>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.</p>
<p>MARKET ALERT</p> <p>Peppers Bell</p> 	<p><u>SUPPLY</u> FAIR</p> <p><u>QUALITY</u> FAIR</p>	<p>ALERT (Red & Yellow) Prices for Green Bell Peppers are trending slightly down this week. Prices for Yellow and Red Bell Peppers are trending slightly up. Georgia is seeing more favorable conditions this week along with higher volumes. Production out of Florida is in its early stages but volumes will pick up each week going forward. The California desert is up and running too.</p>
<p>MARKET ALERT</p> <p>Peppers Chili</p> 	<p><u>SUPPLY</u> FAIR</p> <p><u>QUALITY</u> GOOD</p>	<p>Prices for Chili Peppers are trending up this week. Supplies for Serrano and Anaheim are very tight. Production is coming out of Georgia. Florida is a few weeks away. California and Mexico are in play too.</p>

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

Demand is increasing for the Thanksgiving holiday. The crop will be smaller this season because of the overall yield being lower than last year. Prices are on the rise with the larger sizes fetching a premium. To extend their supply to last through the rest of the 2022 crop season until new crop is available in late Summer 2023, some suppliers will slow down production to 70-80%. Precut potatoes will be impacted as well.

Squash



SUPPLY
FAIR
QUALITY
FAIR

Prices for Zucchini and Yellow Squash is trending up this week. Prices are higher due to the upcoming Thanksgiving Holiday demands, cool weather in Mexico and crop damage associated with hurricanes in Florida.

MARKET ALERT

Strawberries



SUPPLY
EXTREME
QUALITY
POOR

EXTREME ALERT - Supplies are at Critical Level Prices for Strawberries are trending slightly up this week. Prices are extremely elevated and very tight. Production out of California continues to be hampered by rain, cool weather, and disease. Volume is down significantly. Packout and production is being impacted by the quality issues too. Product from Mexico is crossing through Texas, but volume can't keep up with current demands. Production out of Florida has started in a small way and will pick up as the weeks go by. Look for tight supplies for at least another few weeks.

MARKET ALERT

Tomatoes



SUPPLY
EXTREME
QUALITY
BAD

FORCE MAJEURE - Supplies are at Critical Level Prices for 20 lb & 25 lb Round Tomatoes are trending up this week. Prices for Grape and Roma Tomatoes are trending slightly down. No real changes to the update this week. Supplies are extremely tight on the East Coast due to all the hurricane activity in Florida. Production out of Mexico won't see any significant volumes until the first of 2023. Look for high prices and tight supplies until then.

Watermelons



SUPPLY
FAIR
QUALITY
GOOD

Supplies on Seedless and minis continue to be tight. Market will be very tight in December and January. Domestic melons are coming from Florida with light supplies. Northern Mexico is wrapping up and Southern Mexico will start up out of Edinburg and Nogales after the first of the year. Offshore watermelon is expecting to start in December.



MARKET OUTLOOK

Lettuce markets soar to records, but prices should cool in December

By **TOM KARST** November 17, 2022

Pushed higher by a yield-robbing virus in the Salinas, Calif., region and limited volume from other growing regions, fob markets on romaine and iceberg lettuce soared to record highs of \$100 per carton or more in early to mid-November.

The USDA reported average prices for romaine were \$82 per carton in mid-November, up from \$38 in early October and \$28 per carton in early September.

Prices as high as \$110 per carton were reached for Salinas area lettuce in November, Mike Chasen, owner of 68 Produce LLC, Salinas, Calif., said on Nov. 17.

With the runup in fob prices, the retail promotion of lettuce virtually stopped. The USDA's national retail report said only 36 supermarket stores promoted romaine lettuce with ad prices the week of Nov. 11, down from 1,588 stores advertising romaine on Oct. 14 and 9,796 stores promoting romaine with ads pricing on Aug. 26.

Shipping point prices were expected to ease Thanksgiving week but still remain at historically high levels for several weeks.

Salinas Valley lettuce was finished by mid-November, while supplies of lettuces were increasing from Yuma, Ariz., where growers haven't reported problems with the virus.

DISEASE DETAIL

The Grower Shipper Association of Central California said Nov. 10 that the shortfall in lettuce supply this fall has been largely attributed to crop damage associated with an aggressive pest and disease complex of Impatiens Necrotic Spot Virus (INSV) and soil-borne diseases.

Salinas lettuce fields were infected by INSV via thrips migrating from infected host plants, according to the association. Plants infected by INSV can have dark spotting and yellowing, which resembles the effects of sunburn on the leaves.

Another plant disease, Pythium wilt (PW), often accompanies INSV infections and causes the plant to wilt or collapse making this a complicated pest and disease issue for farmers, according to the group.

"In 2022, disease pressure was exacerbated by unseasonably warm weather stretches which caused prolonged stress on the plant making the lettuce more susceptible to disease impacts," the group said.

The disease hit all the leaf lettuces and iceberg in the Salinas region, Chasen said.

"It's horrible to watch," he said, noting that some growers were lucky to get a 10% yield out of fields hit with the virus. "You were watching all these crews go into fields, cutting every head and dropping 90% of them to the ground That's a lot of labor for very little yield."

The INSV disease has worsened over the last 10 years, said Joe Given, co-owner of Ed Given Inc. Salinas, Calif.

"This year was by far the worst," he said, adding that growers planted less acreage because of a lack of irrigation water and the virus destroyed a high percentage of the acres that were planted. "It just kicked everyone in the fanny really hard."

The Grower Shipper Association of Central California established an INSV/PW Task Force in 2021, with scientists, farm advisors and farmers working jointly to learn more about this disease complex and determine preventative and curative control methods, the group said. Varietal tolerance is a key area of focus, in addition to fighting INSV with thrips control through cultural practices.

Christopher Valadez, president of the association, said there is increasing research efforts to identify varieties resistant to both diseases, which often work in combination to destroy lettuce yields.

Big challenges remain, Valadez said, but the work of the association's task force has helped identify varieties that may offer some tolerance of the diseases for the late season period, which is the time that lettuce fields have been most susceptible to damage.

The Central California region accounts for more than half of U.S. annual lettuce shipments, Valadez said.

Given the learnings from this year, Valadez said growers should be in a better...

[Read full article HERE](#)



This head of romaine lettuce showing damage from the Impatiens Necrotic Spot Virus (INSV) in the Salinas Valley earlier this season. (Photo: Courtesy of Grower Shipper Association of Central California)

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