



WEATHER UPDATE

Yuma - Sunny to partly cloudy with highs in the 70s and lows in the 40s for the upcoming week. **Oxnard** - Sunny to partly cloudy for the upcoming week with highs in the 60s and lows in the 50s. **Mexico (Culiacan)**- Mostly sunny; highs in the 80s and lows in the 50s. **Florida, Southern**– Sunny to partly cloudy for the week; highs in the 60s and 70s and lows in the 40s and 50s. **Idaho** - Partly cloudy for the week; highs in the 20s and 30s and lows reaching single digits.

TRANSPORTATION

The National Diesel Average has been recorded at \$3.121 down \$0.040 a gal from last week and up **\$0.220** gal from last year. NPC continues to monitor and track diesel fuel averages by state as well as reported truckload freight rates on a weekly basis. **Transportation continues to work through its most significant structural changes in years in regards to new laws and regulations stressing available truck volume and controlling drivers. Trucks are a little short in AZ, TX, ID, OR & WA.**

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MARKET ALERT

Strawberries
Tomatoes
Celery
Bell Peppers
Brussel Sprouts
Green Kale
Collard Greens
Green Leaf Lettuce
Butter Lettuce

MARKET OUTLOOK



Apples



QUALITY  SUPPLY 

Washington is down on volumes with Reds, Golds and Fujis and considerably down on Galas (15% down) and an amazing 30% down on gr smiths. Volume will be confirmed as the State continue to harvest in the Month of October. Reds and Golds are down significant due to growers cutting their orchards down to replant Honneys, Pinks, Organics, Jazz, Lady Alice, etc. Galas and Gr Smiths - due to such a large crop last season, trees did not respond back - some will say these apples are alternate bearing. Quality of the new Crop is very good with size profile 2 to 3 sizes larger than last year. (small sizes will be limited).

Asparagus



QUALITY  SUPPLY 

Seeing good supply, quality, and demand. This market remains steady, higher in the west.

Avocados



QUALITY  SUPPLY 

Markets at the border are starting to become 2-tiered. Fresh fruit vs old fruit. Supplies continue to be strong and Mexico is picking heavy to make up for the time they stopped. Price points are low enough that many retailers are beginning promotions again, which should start to help with demand. #2 fruit should be readily available going forward to cover any and all foodservice needs. Barring any labor issues in MX, going forward there should be ample supplies available.

Bananas



QUALITY  SUPPLY 

Bananas are showing high quality and supplies are good and should remain steady for the remainder of the year.

Berries



QUALITY  SUPPLY 

Blueberry –Supplies are down and pricing higher. Chilean and Argentina blues are still coming in smaller volume. Colder temps have slowed down crossings out of MX this week and most likely into the middle of next week. These weather issues are also delaying vessels from Chile which is most likely going to create a situation where many vessels may arrive all at once. The concern then will be whose containers will get the priority for unloading first due to the holiday and holiday hours. Excellent volume is expected for after the holidays. **Blackberry** – Volumes are tightening up. The market is holding steady for product from Mexico. The colder days and nights in California is slowing production and pricing trending upwards. **Raspberry** – Volumes are tightening up quickly. The higher demand on the bush berries due to the strawberry challenges is creating the tighter supplies and a slightly higher market on raspberries.

MARKET OUTLOOK

Broccoli



Supplies continue to improve. The forecast in weather is not helping the markets returning to normal. Weather is still an issue. We are expecting for supplies to continue to improve, prices will improve as well. Quality varies from good to fair.

MARKET ALERT

Brussels Sprouts



Weather is still affecting Brussel Sprout supplies. Expect markets and supplies to be short for the next few weeks. Quality is only fair at this time.

Cauliflower



Supplies and availability have improved this week. Weather is still a factor, we do have growers reporting better availability expect prices to improve as well. Quality is Good to Fair.

Cantaloupes



The cantaloupe market has remained strong over the past week. Anticipate a shift in sizing away from jumbo fruit more to regular cartons (including 15ct) by the end of the week arrivals. The first cycle in the Zacapa region of Guatemala will finish in approximately two weeks. Production from this area will drop significantly here at the end due to whitefly pressure but production in Honduras will start to increase next week which should help fill that void. Quality for what has been coming in has been strong with solid internal quality.

Carrots



Overall market is somewhat limited as California is the only growing region currently. Our yields and quality are solid and should remain that way. Colorado and Canada should be starting soon which will increase the overall supply in the market. Once they will start shipping product we will have a better idea of what their crop looks like and what overall market conditions will be.

MARKET ALERT



Celery



Celery supplies are still short in supplies. The winter transition and weather are key factors affecting the Celery market. Product is still coming from Oxnard CA, we are waiting for the Imperial Valley /Yuma AZ new growing region to start. Supplies will be tight for another week. Quality is Good to fair.



Corn



Corn continues to improve in regards to supply, cost, and quality with majority out of FL and Nogales.

MARKET OUTLOOK



Cucumbers



Mexico's production picking up and demand slowing, there is an abundance of cucumbers available in the West. Quality has been really good and the fruit is holding strong. Florida's cucumber harvests are winding down but quality is still good. Honduran imports will pick up steam after next week, which should keep the East in steady supply for the short term.

Eggplant



Mainland Mexico is into great supplies with promotable volumes available. Florida farms are also experiencing good yields with plenty of volume and good quality.

Grapes



Still showing good supplies of Red, mostly Allisons, market creeping up. Autumn Kings are beginning to get a bit tired as most east coast customers will begin to switch to import fruit right after Christmas. The Peruvian imports are slightly behind schedule with small volumes on mostly flames and Thompsons. Chile should see the first arrivals on greens next week!

Green Beans



Beans are readily available in both Eastern and Western markets this week. Quality is strong.

Herbs



Quality and supply is looking good across the board. Sage and rosemary a slightly short and struggling on quality but holding steady.

Honeydews



Honeydew production has also been very limited causing this market to strengthen especially on smaller sizes. Supply will remain steady over the next 10-14 days with mostly large fruit projected.

MARKET OUTLOOK

Iceberg



QUALITY SUPPLY

Supplies and availability have improved this week. Weather and the winter transition affected this market along with the romaine outbreak. Growers are reporting better availability, expect prices to improve as well. Quality is good to fair.

MARKET ALERT

Kale



QUALITY SUPPLY

Short supplies due to weather conditions and transition along with increased prices. Demand is strong.

MARKET ALERT

Leaf



QUALITY SUPPLY

Romaine - Supplies and availability have improved this week. Weather and the winter transition affected this market. Growers are reporting better availability, expect prices to improve as well. Quality is good to fair. Green Leaf/Red Leaf and Boston/Butter Lettuce- Green Leaf, Butter Lettuce and Red Leaf Lettuce are all slowly improving but still at higher markets. Weather and the winter transition affected this market. Growers are reporting better availability, expect prices to improve as well. Quality is good to fair.

Tender Leaf



QUALITY SUPPLY

Arugula, Parsley, Kale Blends, Spring Mix, and Spinach - Quality is fair, due to cold weather preventing the product from sizing up. Suppliers are watching averages.

QUALITY SUPPLY

Lemons & Limes



Lemons are picking strong in both D1 and D3. Central Valley is heavy to 165s, with lots of 140s. Riverside area is heavier to 140's and larger with about 70% choice so we will see the choice market for larger lemons come off over the next few weeks while D3 cleans up for the year. -Limes—Limes are in good supply with a steady market right now, but expected to rise this month on smaller fruit.



MARKET OUTLOOK



Onions



The market today is stronger, and for the first time the USA market report is indicating as such, showing that jumbo yellows were higher on this report than a previous report. This is the first time that's happened in the last four months. Still at lows though, seeing good quality. The market will be interesting into the new year for sure.

Oranges



California Navels are looking great with the market peaking on 72s and smaller. Seeing good supply and quality. Florida Navels will run until mid-December. FOBs on most sizes between \$11 and \$20 with bigs and tinys slightly above and below. **Navels** are starting to have great color, fruit size continues to be a challenge - lots of small, minimal volumes on large fruit. Some limited Export has started on navels.

Pears



D'anjou pears are peaking on 90's and larger. Moderate supplies on 100/110's has the market steady. 120s and smaller are light with a firm market. Bosc pears have a steady market with supplies winding down for the season. Red pears are tight but should last till May. Quality is good on all pears.

MARKET ALERT

Peppers, Bell



Red and yellow peppers: Demand exceeds supply on both field grown and hot house. This will be the trend until after the first of the year, with hot house improving first. Green peppers: The market continues to ease off due to lack of demand and improved production from FL, mostly larger sizes are available. Poor weather forecasted in FL may negatively affect markets.

Peppers, Jalapenos



With growers in Mexico waiting to recover from previous storm damage, demand exceeds supply on Jalapenos. Other specialty peppers are available but remain limited with good quality. Be aware of under sized and misshapen peppers as growers try to catch the market. Chili peppers are still in critical mode with orders on all varieties are being prorated daily. The tight situation isn't expected to change until later in January when re-planted crops come to harvest.

Pineapples



Pineapple supply remains stable and sizing is trending towards the 7/8 sizes. Market pricing is on the rise on the especially on the larger sizes.

MARKET OUTLOOK



QUALITY  SUPPLY 

Potatoes



The market remains steady for the most part across all sizes and grades on norkotahs with burbanks about a buck up. Freight is up as trucks are short. Seeing good quality and supply across the board. US fall potato growing areas held 282.7 million cwt of potatoes on December 1. That is 7.8 million cwt more than they held a year earlier, a 2.8% increase.

QUALITY  SUPPLY 

Squash



Florida growers flushed with squash over the weekend, so there's plenty of product available this week. Quality is questionable on yellow, but nice on the zucchini. Mexico's southern growers are rolling now with excellent supply.

QUALITY  SUPPLY 

MARKET ALERT

Strawberries



Strawberries are on Santa's *Naughty* List. Supplies continue to be short and the market remains in a demand exceeds supply scenario. Pricing is steady going into next week. Growers are covering contracts for their regular participating distributors. Distributor's flexibility in loading area is key with the constant challenges on weather events out of all major growing areas. It is imperative that distributors have orders pre-booked in advance to help eliminate or decrease any possible pro-rates. Still expecting another 2 ½ weeks to be completely out of the woods, and start to get back to normalcy in availability and pricing. LTL trucks out of both Florida and Mexico have been difficult to line up. Quality and berry sizing varies greatly depending on the growing area and farm. Expect to see some rain damage, bruising, pin rot under the calyx, and white shoulders for next week. **FLORIDA** strawberries-- Florida has received 5-6 inches of rain over the last three days, mostly in the furthest south growing areas. Again, no harvesting for today and most growers are saying they expect to be able to get in and access the fields on Saturday. Depending on the area of the farm, growers are saying they expect to resume harvesting on Saturday, but some don't expect to until Monday. Harvesting crews are on "stand by" due to the Christmas holiday, and farm managers are not sure on who might show up if needed on Monday or Tuesday. The lower lying areas may still be too wet to harvest over the weekend. **California** strawberries-- Oxnard is looking to be strong as more volume is coming on each week, recovering from the rains and cooler than normal temps. Wide range of quality and condition. Color is slowly coming along to start promoting this loading area in another couple of weeks. Highs in the mid-60s with sunny days will be helping Santa Maria and Oxnard next week as forecasted. Crossing from **Mexico**-- Very limited volumes crossing into Texas out of Mexico still. Cold front going through the Zamora and Maravatio dropping temps below freezing. This will most likely slow some volumes from crossing until the middle of the upcoming week. Sizing is extremely smaller, around 28ct.

QUALITY  SUPPLY 

MARKET ALERT

Tomatoes



Pricing is slowly coming down on most items with the exception on round tomatoes. Some growers are still at caps. East: Cooler temps in FL continue to limit maturity and production on all varieties. Grape and round production out of central FL is finishing this week. The transition to the Immokalee, FL growing region has started. Demand continues to outpace supply on larger sized fruit. West: Production remains light in Mexico on all varieties due to weather, specifically, heavy rainfall last week which slowed production. Markets will remain unsettled for the next 1-2 weeks until demand eases and supplies increase.



2018 farm bill called big win for fresh produce

“Calling the legislation a big win for fresh produce interests, industry advocates celebrated the signing of the farm bill by President Trump Dec. 20.

In an event that was attended by a host of lawmakers, administration officials and agricultural leaders, Trump signed the Agriculture Improvement Act of 2018 at the Eisenhower Executive Office Building. With the new farm bill, industry leaders said they were able to hold on to programs important to the industry.

The legislation expands funding for key programs important to the apple industry, Jim Bair, president and CEO of the U.S. Apple Association, said in a statement. The legislation, according to United Fresh and U.S. Apple, includes policies that benefit the specialty crop industry:

- Providing \$85 million per year to continue funding the Specialty Crop Block Grant Program;
- Full funding for Specialty Crop Research Initiative at \$80 million, with an additional \$25 million per year for the creation of a citrus trust fund to help combat citrus greening;
- Maintains funding for pest and disease research and the Fresh Fruit and Vegetable Program; and
 - Increases funding for the Food Insecurity and Nutrition Incentive.
- Maintains funding for federal crop insurance programs, including those that cover apples;
- Continued funding for important trade promotion programs, including \$200 million for the Market Access Program and \$9 million for the Technical Assistance for Specialty Crops;
 - Support for programs that combat invasive pests and diseases at \$75 million annually;
 - Preservation of the integrity of the Fresh Fruit and Vegetable Snack Program; and
- Strengthened “Buy American” provisions for foods purchased for federal feeding programs.

“We look forward to working with USDA and other industry partners to ensure a smooth implementation process,” Guenther said in the release. “By approving this legislation, both Congress and the President have affirmed the increasing importance of fresh produce and specialty crops in both our economy and our food supply.”

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 and our Midweek Update released every Wednesday. Have a great week!
Keeping You Informed,



Your Dedicated NPC, LLC Staff