

MARKET OUTLOOK



Apples



SUPPLY
FAIR
QUALITY
GOOD

West coast new crop apples are being packed, however small sizes remain fairly tight. Washington exports a substantial amount to Mexico which have driven the market up over the last few weeks on many varieties. East coast apples are available as well. Market price remains firm on small fruit as local schools take most of the volume.

Asparagus



SUPPLY
GOOD
QUALITY
GOOD

Mexican production continues to decrease due to seasonality on the large size. Small and standard are still in good production. This should continue until Northern Caborca starts. Volume from Southern Peru continued to flatten out. Northern Peru volume has increase with new fields opening up. Markets has slowed down with the post Thanksgiving pull.

Avocados



SUPPLY
GOOD
QUALITY
GOOD

Market is mostly steady as supplies this side of the border have surpassed previous months' ranges with the demand and harvest are both slightly down. As we enter Mexico's peak season, the size curve continues to increase on larger sizes and the Normal crop has had some time to size up. Small sizes still remain prevalent and the adjustment provides a more balanced size curve. Demand continues to match supply and aside from a couple dollars up & down, this strong market has continued into December.

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
FAIR
QUALITY
GOOD

Blackberries: Prices for Blackberries are trending down this week. Quality has been impacted by rains in Mexico. It is suggest that fruit is turned as fast as possible all along the supply chain to help keep the fruit fresh as possible. This will help reduce shrink too.

Blueberries: Prices for Blueberries are stable this week. Supplies are expecting prices to come off a bit due to the light post holiday demands.

Raspberries: Prices for Raspberries are trending down this week. The low post holiday demands is helping to keep pressure on pricing.

MARKET OUTLOOK



Beans Green

SUPPLY
 GOOD
QUALITY
 GOOD

Volume and quality remain good this week from Georgia and Northern Florida. Markets has decreased as expected post Thanksgiving.

MARKET ALERT
Broccoli

SUPPLY
 SHORT
QUALITY
 GOOD

Supplies will continue to be short this week. Supplies will be limited for another week. Good quality is been reported going into next week. Growers are expecting for better supplies in a few weeks. (F.O.B pricing for this week \$27.50 - \$28.50).

MARKET ALERT
Brussels Sprouts

SUPPLY
 SHORT
QUALITY
 GOOD

Supplies are short this week. Growers are reporting fair quality. Supplies are expected to be limited going into next week. (F.O.B pricing for this week \$26.75 - \$27.65).

MARKET ALERT
Carrots

SUPPLY
 FAIR
QUALITY
 GOOD

Suppliers are getting some very poor yields on baby peeled carrots. With high demand and low supplies during the Thanksgiving holiday is resulting in product to be prorated until mid January.

Cauliflower

SUPPLY
 GOOD
QUALITY
 GOOD

Supplies are good at this time. Overall quality is reported as good. Supplies are expected to be steady for a few weeks. (F.O.B pricing for this week \$12.75 - \$13.05).

Cantaloupes

SUPPLY
 GOOD
QUALITY
 GOOD

Supplies have started to increase this week from Guatemala and with lower demand after Thanksgiving the market is adjusting to lower pricing levels. The majority of volume arriving has been 9s and larger which has seen the most pressure on its pricing. 12/15s are still very limited and able to fetch a premium over the larger melons. Quality from Guatemala continues to be of excellent quality. Brix levels are the flavor profile has been extremely good.



MARKET OUTLOOK

MARKET ALERT

Celery



SUPPLY

GOOD

QUALITY

GOOD

Supplies have improved this week. Supplies are expected to be steady, we should see better supplies once we start the Yuma crop mid December. (F.O.B pricing for this week \$10.75 - \$11.05).

Citrus



SUPPLY

FAIR

QUALITY

FAIR

Limes: Market remains somewhat steady as overall availability and movement has slowed due to seasonality trends. Volume will decrease towards the end of December as the new production cycle start. Growing conditions have demonstrated sufficient rain, however, temperatures lack the heat to promote accelerated growth. Peak sizing will consist of predominately 230's & 250's, with low yields represented on large fruit comes the second or third week of December.

Lemons: Volume is declining as some operation have ended production for the season. Crop is yielding a greater production of choice-grade fruit than fancy, so a more-defined pricing spread over the coming week will be expected. Currently peaking on 115's, with low volume present on 235/200/165's. Suggest altering the spec to complement crop trends. Season is expected to end the first or second week of January, with supplies and availability dwindling down until then.

Oranges: California navels are going pretty steady. The crop is currently peaking good range of sizes but large are a little tight. Quality is excellent with high brix. The overall market has been to the normal side vs previous years.

MARKET ALERT

Corn



SUPPLY

FAIR

QUALITY

POOR

Prices for corn are stable this week. Supplies remain tight out of California and Florida. Once production out of Florida ramps up, expect quality to improve and prices to come down to more reasonable levels.

Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Cucumbers are trending down this week. The post holiday demands are low as usual. That's helping to keep prices down. Production is coming out of Florida & Nogales. Cucumbers from Honduras are expected to arrive in South Florida during the next week or two.

Eggplant



SUPPLY

GOOD

QUALITY

GOOD

Prices for Eggplant are trending down this week. Production is coming out of Florida and Mexico. Growers out of Mexico are reporting very nice quality at this time.



MARKET OUTLOOK

Grapes



SUPPLY
GOOD
QUALITY
GOOD

Domestic is dwindling down with import expected to start arriving by mid December. Most of the CA harvest will be completed by the end of the mid December.

Honeydews



SUPPLY
FAIR
QUALITY
FAIR

Production is still limited from Guatemala with the overall majority of what is arriving being larger fruit (5s and larger). This has kept 5/6/8s at premium levels. Flexibility of sizing may be required. Anticipate the production to begin slowly increasing by later next week.

Iceberg



SUPPLY
GOOD
QUALITY
GOOD

Supplies have improved this week. Market pricing is better. Quality and Weights have also improved. Growers are now shipping from Yuma AZ. (F.O.B pricing for this week \$17.61 - \$18.61).

MARKET ALERT

Leaf



SUPPLY
SHORT
QUALITY
POOR

Romaine: Supplies will continue to be limited this week. Market is showing a slight improvement. Overall quality is less than fair. Weights will be on the lighter side until supplies improve. Growers are shipping out Yuma AZ. (Romaine pricing for this week \$21.75- \$23.05) (Romaine Hearts pricing for this week \$26.45 - \$27.70).

Green & Red Leaf Lettuce: Supplies are much better this week. Market pricing has also improved. Growers are now shipping out of Yuma AZ. Supplies are expected to be steady for a few weeks. (F.O.B pricing for this week \$12.15 - \$18.45).

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).

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 OUTLOOK

MARKET ALERT

Onions



SUPPLY
FAIR
QUALITY
GOOD

No change from last week. Markets remain close to the exact same, seeing strong demand and decent quality but yield and supply remain quite short and are of extreme concern for the rest of the season.

MARKET ALERT

Onions Green



SUPPLY
SHORT
QUALITY
GOOD

Supplies will be light for a few weeks. Demand and quality continues to be good. (F.O.B pricing for this week \$16.25 - \$18.15).

Pears



SUPPLY
FAIR
QUALITY
FAIR

This year's pear crop was down significantly, with mostly larger fruit available. Growers are trying to drag out supplies as best as possible until new crop starts next August .

Peppers Bell



SUPPLY
GOOD
QUALITY
GOOD

Prices for Green, Red and Yellow Peppers are trending down this week. Growers are reporting good supplies for Bell Peppers this week. Production is coming out of Florida, Georgia, Mexico and California.

MARKET ALERT

Peppers Chili



SUPPLY
FAIR
QUALITY
FAIR

Prices for Chili Peppers are mixed this week. Prices for Jalapeno peppers and Tomatillos are down a bit but remain at very elevated price down. Growers in Mexico are expecting tight supplies until January. Production out of Mexico is still being impacted by the Hurricane in October. Numbers out of Georgia are on the downswing and Florida's production is ramping up around the Plant City / Palmetto Florida area.

Pineapples



SUPPLY
FAIR
QUALITY
GOOD

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.

MARKET OUTLOOK

MARKET ALERT

Potatoes



SUPPLY

FAIR

QUALITY

GOOD

No change from last week. Markets remain close to the exact same, seeing strong demand and decent quality but yield and supply remain quite short and are of extreme concern for the rest of the season.

Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Yellow Squash are trending down this week. Prices for Green Squash are stable. The post holiday demands are low as usual. That's helping to keep prices down. Production is coming out of Florida and Mexico.

MARKET ALERT

Strawberries



SUPPLY

FAIR

QUALITY

FAIR

Prices for Strawberries are trending down this week but cost are still elevated. Growers are reporting increased production out of Mexico, Florida and Oxnard California. Look for lower prices as Mexico and Florida continue to ramp up volumes.

MARKET ALERT

Tomatoes



SUPPLY

FAIR

QUALITY

GOOD

Prices for Tomatoes are trending down this week but are still elevated. As expected, post holiday demands are low and that's keeping prices down. Production continues to pick up out of Florida. Mexico will cross fruit in late December or early January. Volumes out of Mexico was impacted by hurricane activity in October.

Avocado-producing Mexican state looks for access to U.S.

"The Mexican government is currently negotiating with the U.S. to allow avocado exports in from Jalisco, according to the Ministry of Agriculture and Rural Development (Sader).

The Secretary of Sader, Víctor Villalobos said that his counterpart in the U.S., Thomas Vilsack, has shown interest in the subject.

Mexico is the world leader in the cultivation and export of avocados and it contributes one of every three avocados entering the international market with a planted area of 241,000 hectares and a production of almost 2.4 million metric tons (MT) in 2020.

About four-fifths of national production and almost all exports come only from Michoacán, a southwestern state with a production volume of more than 1.8 million MT per year.

Villalobos announced that progress is being made in negotiations with the U.S. to open avocado exports from Jalisco to the market in that country.

"Avocados are so important for Mexico as the fruit is the main agricultural export product in the country."

Only from January to September 2021, exports totaled \$2.2 million, an increase of almost six percent year-on-year, Villalobos said.

Throughout all of 2020, Mexican avocado exports totaled almost three million, an increase year-on-year despite the pandemic, according to the Bank of Mexico.

The main export destination is the U.S., but other markets include Japan, Canada, Spain, the Netherlands, France, China, the UK, Honduras, South Korea and El Salvador."

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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 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

