

MARKET OUTLOOK



Apples



SUPPLY
FAIR
QUALITY
GOOD

The market continues to stay firm as demand remains strong, leaving growers with less fruit. Overall crop is down this year. Washington apple crop is significantly smaller than previous years. The heat Washington has experienced past summer has resulted in some challenges that the industry is still dealing with. The average fruit size appears to be down a half size to a full size and bi-color varieties had troubles reaching their optimum appeal. We can expect strong market for large, premium, high color No. 1 fruit. Premium Honeycrisp as well as Gala continues to be tight. Pricing overall is running higher due to the shorter crop, inflation in the growing chain including labor, picking, and transporting of apples. Quality has been good.

Asparagus



SUPPLY
SHORT
QUALITY
FAIR

Asparagus production from Caborca/San Luis region in Mexico is getting better on the smaller sizes but continues to struggle with the larger sizes. Cooler weather remains for a couple of days with warmer days coming. Markets are less active with the increase volume in the East coast. Standard and large supplies are good in the West coast and prices is expected to remain stable. Jumbo and XL supplies are fair and expected to be a little tighter over the next week.

Avocados



SUPPLY
GOOD
QUALITY
GOOD

Size curve is lacking big sizes therefore market is remaining strong. This trend is expected to go through June until imports from Peru arrive. Most of Peruvian fruit go to retail but is an important relief for foodservice.

MARKET ALERT

Bananas



SUPPLY
GOOD
QUALITY
GOOD

Availability continues to be less than desired, but it does look like we are out of the woods when it comes to the "strikes" that have gone on in GTM. The bananas are still taking longer than desired to color up than we would like but the supply is starting to pick up.

Berries



SUPPLY
GOOD
QUALITY
GOOD

Blackberries: Prices for Blackberries are trending up this week. Production is a bit volatile this week. Growers are looking for improved supplies during the next couple weeks. We're getting some reports that the fruit is looking good.

Blueberries: Prices for Blueberries are trending up this week. Production will move from import to domestic during the weeks to come. Look for the market and prices to tighten up going forward.

Raspberries: Prices for Strawberries are stable this week. Growers are currently reporting goof supplies on Raspberries. The trend is expected to remain the same during the next couple weeks. Just like with Blackberries, Growers are reporting nice quality for Raspberries.

MARKET OUTLOOK



SUPPLY

Beans Green

FAIR

QUALITY

FAIR



Growers in East coast are seeing some decay in the beans due to rain, and cold weather in the growing region. Expecting better quality in the next week. Supplies on the West coast are steady, and quality is good.

SUPPLY

Broccoli

GOOD

QUALITY

GOOD



Supplies continue to be very good this week. Growers are reporting good yields at this time. Quality is reported as good at this time. Growers are expecting supplies to remain steady for a few weeks. (F.O.B pricing for this week \$8.85 - \$9.85)

SUPPLY

Brussels Sprouts

GOOD

QUALITY

GOOD



Supplies continue to be very good this week. Quality is reported as good at this time. Growers are reporting improved yields, expect for steady supplies for a few weeks. Good time to promote Brussel Sprouts. (F.O.B pricing for this week \$14.50 - \$15.75)

MARKET ALERT

SUPPLY

Carrots

POOR

QUALITY

GOOD



Crop yield is low. Packing houses having issues also with labor. Jumbo carrots and some pre-cut value-added items are impacted.

Cantaloupes

SUPPLY

GOOD

QUALITY

GOOD



Strong volumes continue with the cantaloupe into all ports. Sizing has shifted from being heavier to 12/15s last week to 9/9Js followed by 12s. This is more conducive for the retail demand that is in place over the next few weeks with strong promotions planned. We are beginning to see true Spring-time characteristics with better shell color, sizing, and higher brix levels.

MARKET ALERT

SUPPLY

Cauliflower

SHORT

QUALITY

GOOD



Supplies continue to be very limited this week. Overall quality is reported as good, growers are reporting lower yields at the time of harvest. Growers are expecting supplies to be light until we transition to Salinas CA. (F.O.B pricing for this week \$26.13 - \$26.66)

MARKET OUTLOOK

MARKET ALERT

Celery



SUPPLY
SHORT
QUALITY
GOOD

Supplies are limited this week. Quality is reported as good. Most growers are expecting for markets to increase as Yuma AZ is getting close to the end of the season. Celery will be moving to Oxnard CA and Santa Maria CA. (F.O.B pricing for this week \$21.55 - \$22.35)

MARKET ALERT

Citrus



SUPPLY
FAIR
QUALITY
FAIR

Limes ALERT - FORCE MAJEURE: Production is low as costs remain relatively stable (& still elevated) in Mexico. Pricing is expected to become more flexible in the coming weeks as small fruit becomes more plentiful. Large fruit is becoming increasingly scarcer as the new production cycle begins harvests. There will be a significant pricing gap between small & large fruit going forward. Some groves are experiencing a loss of the new bloom due to cold temperatures and excess rain – which could ultimately impact the crop towards the end of April in terms of production/yields. We will be able to predict the reality of this situation within the next two weeks. Demand trends will dictate the velocity of further cost shifts. During this time, please plan supply in advance and be cognizant of frequent price changes.

Lemons: The rain kept us from picking heavy in December and now with the weather heating up color is starting to change - so it's time to pick and we cannot stop at this point. Lots of lemons available and we expect this to remain this way until mid-April. Currently Fruit is peaking on a 115s /140s / 95s.

Oranges RADAR: Good volumes on 72's and larger Fcy and Choice available. With the market price increase throughout the industry on Navels domestic sales have slowed way down on all sizes. Due to limited supplies this year the industry needed this will help to extend this year's Navel crop. 88's and smaller will continue to be tight we expect this to remain the same thru the end of the navel season. We will start CA vals mid-April to help with getting some of the fruit with smaller sizing.

Corn



SUPPLY
FAIR
QUALITY
FAIR

Prices for Corn is trending up this week. Supplies out of South Florida are a bit tighter this week. Supplies are inconsistent but typical for this time of year. Mexico is keeping the needs in the West covered.

MARKET ALERT

Cucumbers



SUPPLY
FAIR
QUALITY
FAIR

Prices for Slicing Cucumbers are trending up this week. The season for Imported fruit out of Honduras is winding down and Florida can't make up the needed volume. Mexico is starting production out of new fields and is that keeping the market in check for the West.

Eggplant



SUPPLY
GOOD
QUALITY
GOOD

Prices for Eggplant are trending down this week but at the same time the market is tight. Eggplant supplies are traditionally tight out of Florida this time of year. Look for the market to remain strong for the next 4 to 6 weeks. Supplies out of Mexico is in decent shape and supplies are sufficient to cover the West.



MARKET OUTLOOK

Garlic



SUPPLY
SHORT
QUALITY
GOOD

Garlic will start to feel a slight squeeze due most US growers getting closer to a Growing Gap and relying on Imports to supplement. Imports from China has slowed again due to lack of containers and increase in tariffs.

MARKET ALERT

Grapes



SUPPLY
GOOD
QUALITY
GOOD

Green grapes are still short but reds already making a big difference in volume reaching demand, quality is improving and prices coming down.

Honeydews



SUPPLY
FAIR
QUALITY
GOOD

Honeydew arrivals have also been good lately, but sizing has leaned strongly to the 6/8s leaving the 5/5Js in a very limited position. Flexibility of sizing may be required, if necessary, down a size into 6s. Quality has also been good on the dewes with clean external quality with brix levels maintaining a mostly 12-13% range.

MARKET ALERT

Iceberg



SUPPLY
SHORT
QUALITY
FAIR

Supplies continue to be extremely short this week. Quality and Weights will be only fair at this time. Expect for smaller heads and weights to be below normal. Growers are expecting supplies to become limited the next few weeks until we transition to Huron CA and Salinas CA. (F.O.B pricing for this week \$48.25 - \$49.25)

MARKET ALERT

Leaf



SUPPLY
FAIR
QUALITY
FAIR

Romaine ALERT: Supplies continue be extremely short this week. Growers are encountering some quality issues at field level blistering and epidermal peel. Romaine and Romaine Hearts quality will be fair at best. Growers are expecting for supplies to become very limited the next few weeks until we transition to Huron Ca and Salinas CA. (Romaine pricing for this week \$41.80 - \$42.95) (Romaine Hearts pricing for this week \$43.60 - \$45.55)

Green & Red Leaf Lettuce ALERT: Supplies are light this week. Growers are reporting average yields. Quality is reported as only fair with light color and some fringe burn. Supplies will continue to remain average until we transition to Salinas CA. (F.O.B pricing for this week \$19.56 - \$21.95)

Tender Leaf: Supplies continue to be good 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 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
FAIR

Onions supplies continue to shrink at a fast pace with some already finished up earlier than usual. Markets is still very active on all sizes and colors. Reds are the tightest, but all colors are a demand exceeds supply without immediate relief in sight. Onions continue to get worse; demand exceeds supply is extreme. This is vastly affecting precut onions as well. Quality is still a concern and not lasting on the supply that is left either. All FOBs went up another \$.50—\$2 this week.

Onions Green



SUPPLY
GOOD
QUALITY
GOOD

Supplies continue to improve this week. Market pricing is starting to improve and should continue improving. Supplies coming from Mexico will improve the next few weeks. (F.O.B pricing for this week \$10.00 - \$11.20)

Pears



SUPPLY
FAIR
QUALITY
FAIR

Bartletts, Anjou, red pears and Bosc are now shipping out of Washington State and Oregon. The volume this year seems to be light with the fruit expecting to run a size or two smaller than last season. The large high-quality fruit will bring a premium this year and the prices will trend up over the next couple of months on them. Prices on Bartlett pears is rising with strong demand in the last few weeks. Most shippers will finish up with their Bartlett crop in February. Imported Bartletts are arriving to replace the domestic crop.

MARKET ALERT

Peppers Bell



SUPPLY
FAIR
QUALITY
GOOD

Prices for Green Peppers are trending up this week. Prices for Red and Yellow Peppers are trending down. Supplies are tight out of Florida and Mexico. Growers aren't expecting the situation production to improve until the end of March at a minimum.

MARKET ALERT

Peppers Chili



SUPPLY
FAIR
QUALITY
FAIR

Prices for Chili Peppers are stable this week with an upward bias. South Florida is producing minimal supplies. Central Florida is about 4 weeks away from adding to volumes. Production is tight out of Mexico too. The market for Poblanos is expected to be active during Lent too.

MARKET OUTLOOK

Pineapples



SUPPLY

GOOD

QUALITY

GOOD

Pineapple volume continue to be ok. The size profile is shifting towards the larger size due to great growing condition. Quality and taste profile are great.

MARKET ALERT

Potatoes



SUPPLY

FAIR

QUALITY

GOOD

This market remains of high concern for the duration of this crop. Potato market has stabilized on all sizes for now but it's a mixed profile depending on the region. Price remains much higher than average with reduced yields. Cold weather and snow are now playing a part in the northwest along with continued shortage of trucks and freight concerns. With the shortage on trucks, freights continue to be extremely high.

Squash



SUPPLY

FAIR

QUALITY

GOOD

Prices for Green and Yellow Squash are trending up this week. Production out of Florida is inconsistent. Growers are expecting for lower volumes for the next couple weeks. Production out of Mexico is presently off too. Look for tight supplies over the next couple weeks.

Strawberries



SUPPLY

GOOD

QUALITY

GOOD

Prices for strawberries are trending down this week. Production out of Mexico and Florida is winding down as the season comes to an end. Production out of Oxnard and Santa Maria will feel the pressure but supplies are expected to increase around that timeframe. Weather will set the tone for the direction of the markets as Florida and Mexico come out of the picture.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

Prices for Tomatoes are stable this week. Growers are reporting steady supplies out of Florida and Mexico. Growers out of Florida are expecting supplies to tighten up over the next few weeks due to bloom drop from the freeze last month. Production out of Mexico is expected to remain strong for another couple weeks before coming off. They will be transiting to new fields at that time.

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Expect to see a slight gap in production on the seedless watermelon with only limited arrivals anticipated. Higher winds pushed through the growing region which has impacted short-term production. Mexican supplies are drastically reduced and expected to stay this way over the next few weeks.

ProduceIQ: Lettuce prices soaring

March 7, 2022 - Analysis | Blue Book Services

If you are waiting for signs that the pandemic is over and produce life is returning to normal, look no further than the SEPC's Southern Exposure. The event was booming! The return of corporate buyers made for record attendance and superhero attitudes for this Marvel-themed party... eh hem... trade show.

A quick note for those following inflation news, U.S. oil traded above \$125 a barrel over the weekend. Crude oil prices are at their highest price since 2008 and are anticipated to climb further due to the war in Ukraine.

Cold and wet weather in the desert is tightening lettuce supply. Iceberg lettuce prices have more than tripled in seven days. Prices launched from \$12 to \$36 last week and are opening this week in the \$40s. Cold weather has taken a toll on supply and most available product has ice-related impacts.

Romaine markets aren't doing much better. Both iceberg and romaine prices are sky-rocketing! Markets will remain active for the next few weeks, that is, until lettuce production transitions northward in April. Desert volumes are a bit lower, and organic quality issues are forcing some buyers to return to conventional.

For full story: <https://www.producebluebook.com/2022/03/07/produceiq-lettuce-prices-soaring/>

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

