



MARKET OUTLOOK

SUPPLY = GOOD | QUALITY = GOOD

Apples



This year's Washington State Apple Crop is now estimated at 121 million boxes vs shipping 133.5 million last year. This is a significant drop from last season but WA will have Apples to sell throughout the Year. Eastern Washington had 2 major wind storms late September/Early October where in some areas devastated orchards. Plus - some varieties did not bounce back from the year before, we call it a light set. Also, late October - we had a few days between 12 and 18 degrees - some apples did not make it through. Reds, Golds, Galas and Gr Smiths are the varieties mostly impacted by the loss. The Farm to Family Box Program has been a huge part of the Price Increases seen in the past 2 Months.

SUPPLY = GOOD QUALITY = GOOD

Asparagus



Peru: Low Volume, Low Demand, Good Quality. (Mexican Volume is affecting Peruvian demand.) (est. next arrival is within 2 weeks.) Mexico: Low/Steady Demand, Good Quality, Good/High Volume.

SUPPLY = GOOD | QUALITY = GOOD

Avocados



We have topped the \$40 FOB level on 48's and larger and if demand remains strong Mexico is in a perfect position to keep prices going up. Harvest early in the week has been down and shippers are now looking for mid-range size fruit that they cannot readily get without paying the price. Tough to say how this scenario will play out as far as a ceiling, but it seems evident that MX has slowed this down to take further opportunity to move things upward. \$50 by Monday is realistic. There is still a good spread in some eastern US markets, as cheaper fruit is thought to be older and being moved quickly as it cannot be held too long before breaking. Dry matter continue to stair step up slightly, now just above 29% level, with fruit breaking quickly once triggered. 100% Normal crop is now being harvested in Mexico. Inventory to begin the week stands at 57.1 MM lbs., representing a 6% decline compared to last week.

SUPPLY = FAIR | QUALITY = GOOD

Bananas



Weather is getting better and better in the topics. This will cause an increase in quality. Supply is still lower due to the hurricanes in 2020.

SUPPLY = FAIR | QUALITY = FAIR

Berries



Blackberries-- : Prices for Blackberries is trending up this week. Supplies are tight due to freezing weather in Mexico last month. Look for some price relief in 2 to 3 weeks. **Blueberries**: Prices for Blueberries is trending down this week. Availability is based on vessels from central America getting unloaded on a timey bases. Production is also picking up out of Mexico. **Raspberries**: Prices for Raspberries is trending up this week. Just like with Blackberries, production was impacted in January by freezing weather in Mexico. Growers are expecting supplies to pick up a bit at the end of March.

SUPPLY = GOOD | QUALITY = GOOD

Beans, Green



Seeing good demand, supply and quality.



MARKET OUTLOOK

Broccoli



Broccoli Supplies are down compared to last week. Supplies are winding down as we get closer to finishing up in the desert. Fair quality is been reported at this time. Demand for Broccoli Crowns has increased this week.

SUPPLY = FAIR | QUALITY = FAIR

SUPPLY = GOOD | QUALITY = FAIR

Brussels Sprouts



Brussel Sprouts supplies are down compared to last week. Supplies are down due to some quality concerns. Fair quality is been reported at this time.. Demand continues to be down at this time.

SUPPLY = GOOD | QUALITY = GOOD

Carrots



With retail servicing a lot of demand that is normally taken care of in the foodservice sector it is putting some strains on compacity as the production system is not built to service the additional demand for these products. There are not enough hours in the day to make everything being requested.

MARKET ALERT

SUPPLY = FAIR | QUALITY = FAIR

Cauliflower



Cauliflower supplies are short this week. Cooler growing conditions and the season winding down in the desert has caused short supplies. Fair quality is been reported at this time. Supplies are expected to continue to be short next week.

SUPPLY = FAIR | QUALITY = GOOD

Cantaloupes



Melon arrivals have started to increase this week in Florida which is causing the market to adjust down to lower pricing levels from its highs. This had been anticipated to occur in early March as the Spring cycle ramped up. Peak numbers will hit over the next few weeks causing the market to settle more but we expect the market to stabilize as retailers are on major promotions throughout the month of March leading into Easter which should assist in keeping the larger volumes moving.

SUPPLY = GOOD | QUALITY = GOOD

Celery



Celery supplies are steady this week. Growers are reporting good supplies and markets seem to be improving. Good quality is been reported at this time. Demand for Celery has definitely increased this week.

SUPPLY = FAIR | QUALITY = FAIR

Corn



Price for corn out of the East is trending slightly up this week. Corn prices out of Mexico is trending down at this time. Production out of Florida has been impacted by month of bad weather. Mexico is seeing production increase at this time.



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Cucumbers



Prices for Cucumbers is trending down this week. Growers are reporting good numbers out of Honduras. Production out of Florida is ramping up. Mexico is seeing lower than expected production but should see better numbers in the weeks to come.

SUPPLY = GOOD | QUALITY = GOOD

Eggplant



Prices for Eggplant is trending up this week. Production out of Florida and Mexico is coming in lower than expected. Look for prices to come off a bit in the weeks to come.

SUPPLY = FAIR | QUALITY = GOOD

MARKET ALERT

Grapes



Red volume continues to increase. Green grape market is elevated slightly, with the USDA not reporting accurately. Availability will be lower from this point all the way till the MX season starts.

SUPPLY = BAD | QUALITY = FAIR

Honeydews



The honeydew market has started to react higher with fewer crossings through Nogales since last week. The western market has already seen a big spike in pricing while Florida is just starting to react. What is coming in has seen a shift in sizing from smaller fruit (8s) to larger melons (mostly 5s). Honeydew quality arriving today is clean externally with higher brix levels than we have seen so far this season.

SUPPLY = FAIR | QUALITY = GOOD

Iceberg



Iceberg Lettuce supplies are down this week compared to last week. Growers are reporting lower yields at this time due to cool mornings. Good quality and good weights are been reported at this time. Demand for Iceberg Lettuce has increased this week.

SUPPLY = GOOD | QUALITY = GOOD

Leaf



Romaine: Romaine Lettuce supplies continue to be steady this week. Supplies are expected to remain steady going into next week. Good quality and good weights will continue for next week. Demand for Romaine Lettuce has increased this week.

SUPPLY = GOOD | QUALITY = GOOD

Green Leaf/ Red Leaf/ Butter (Boston) Lettuce: Steady supplies are expected going into next week. Good quality is been reported at this time.

SUPPLY = FAIR | QUALITY = GOOD

Tender Leaf



Steady supplies for this week. Good quality, no concerns.



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SUPPLY = FAIR | QUALITY = FAIR

Lemons & Limes



LIMES: We continue to see a two tier market. Availability in MX is extremely tight, demand exceeds supply. This will remain the normal for the next two weeks. Mexico is also experiencing some rain which possibly will cause some quality issues. **LEMONS:** Currently picking our D1 (Central Valley) crop and it is very nice and strong. The rain will help with growth which we needed very much. 115's thru 75's will remain firm as most of the volume will be in the 165/140 size structure. We do not anticipate any supply issues.

SUPPLY = FAIR | QUALITY = GOOD

Mushrooms



We are in the winter months where there is some activity as demand increases across the country. COVID restrictions are also affecting things at supplier level. Look for things to remain a bit tight for the next couple weeks and improve into the spring.

SUPPLY = GOOD | QUALITY = GOOD

Onions



Markets are up \$0.50 to a buck across the board on all yellow onions. Mediums are the tightest but no immediate supply concern. Whites up a bit as usual and reds steady. Will stay in the northeast for the next couple of months before the annual CA transition.

SUPPLY = GOOD | QUALITY = GOOD

Onions, Green



Green onion supplies continue to improve. Growers are reporting improved quality and supplies.

SUPPLY = GOOD | QUALITY = GOOD

Oranges



Fruit is great this season, appearance and eating quality is the best we have seen in many years. Fruit is currently peaking on 72/ 56 /88 – we are seeing a small percentage of 113/138 size fruit. We anticipate this to be the case the rest of navel season, which will mean if we find a strong demand for 113/138's we will start Valencia oranges earlier than normal, possibly the end of March. Due to the lack of supply on 113/138's we are planning these sizes to be firm in price and we will see market adjusting up each week as we move thru Feb.

SUPPLY = GOOD | QUALITY = GOOD

Pears



2020 is a clean crop of pears and quality is very good. Barts will be available through the last week of Feb or first week of March. New crop starts mid-August. Anjou's – through August, just in time for new crop. Red Pears – through June – new crop starts mid-August. Bosc – through April – new crop starts early September.

SUPPLY = BAD | QUALITY = FAIR

MARKET ALERT

Peppers, Bell



Prices for Green, Red and Yellow Peppers is trending up this week. Excess production has kept prices in check over the last few weeks. Growers in Mexico and Florida have recently walked away from some acreage. That is helping to put some pressure on prices. It would be prudent to keep a close eye on arrivals because there is some older fruit in the pipeline.



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SUPPLY = FAIR | QUALITY = FAIR

Peppers, Chili



Prices for Chili Peppers is trending up this week. Growers report limited supplies out of South Florida. Supplies should pick up when central Florida begins production in a few weeks. Production out of Mexico was impacted by wet and cooler weather last month. Keep a close eye on arrivals. Growers are reporting only fair quality for Chili Peppers.

SUPPLY = GOOD | QUALITY = GOOD

Pineapples



Seeing good quality and demand. Cold front brought a slight increase in precipitation but lower night temps. Harvest age continues to be adjusted upwards; sugar content rose and slight external color decline.

SUPPLY = GOOD | QUALITY = GOOD

Potatoes



This market remains stable and steady. Seeing good demand and quality at this point. Don't foresee any concerns at this time. Some suppliers into burbanks while others will transition in May. Average spread between varieties, prices remain competitive across the board.

SUPPLY = GOOD | QUALITY = FAIR

Squash



Prices for Green and Yellow Squash is trending down this week. Production is coming out of Mexico and South Florida. Central Florida will ramp up production during the next 2 to 3 weeks. Growers in Mexico and South Florida are reporting challenges with quality at this time.

SUPPLY = FAIR | QUALITY = FAIR

Strawberries



Prices for Strawberries out of California and Mexico is trending up this week. Prices out of Florida are trending down. Production out of California is seeing production impacted by cool weather. Production out of Central Mexico is declining with production out of Baha on the upswing. Production out of Florida is expected to come down in the weeks to come.

SUPPLY = FAIR | QUALITY = GOOD

Tomatoes



Prices for 20 lb Round, 25 lb Round, Grapes, and Cherry tomatoes is trending up this week. Prices for Roma tomatoes is steady this week. Production out of Florida was impacted by bloom drop. Production will start in central Florida during the next few weeks. Growers out of Mexico are seeing increased numbers this week. That is helping to keep pressure on prices.



MARKET OUTLOOK

American Rescue Plan Act gives industry new resources, United Fresh says

By [TOM KARST](#) March 11, 2021

“More help is on the way.

Congress has passed a new COVID-19 relief package, with President Biden signing the [American Rescue Plan Act of 2021](#) into law on March 11.

According to a member update from the [United Fresh Produce Association](#), the legislation builds on previous COVID related bills including the CARES Act which passed in March 2020 and December’s COVID relief bill.

Notably for the industry, United Fresh said the American Rescue Plan Act:

- Increases fruit and vegetable benefits in the Women Infants and Children program food package to \$35 per month for four months. The increase, according to United Fresh, should be the first step in permanently raising the WIC produce benefit levels as recommended by the Academies of Science, Engineering and Medicine;
- Boosts Supplemental Nutrition Assistance Program payments by 15% and provides Pandemic Electronic Benefit Transfer payments (P-EBT) to school-age children to replace meals they would be getting at school and through the summer;
- Provides \$4 billion for food and agriculture supply chain in the form of purchasing and distributing commodities – specifically fresh fruits and vegetables – along with providing grants and loans to the agriculture supply chain to respond to COVID-19 and make loans and grants to help improve the food and agriculture supply chain resiliency; and The bill also contains the Restaurant Recovery Act which includes \$25 billion in grant funding for restaurants to use for past expenses including account receivable debts, along with re-opening cost.”

<https://www.thepacker.com/news/industry/american-rescue-plan-act-gives-industry-new-resources-united-fresh-says>

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!