

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
GOOD
QUALITY
FAIR

Asparagus production from Caborca/San Luis region in Mexico is getting heavy on the small and standard but continues to struggle with the larger sizes on the East coast. Peruvian is starting and should increase in the next few weeks. On the West coast, standard and large supplies are good, and prices is expected to remain stable. Jumbo and XL supplies continues to be lighter.

Avocados



SUPPLY
GOOD
QUALITY
GOOD

With Monday being a holiday in Mexico, this week's harvest will also be light. US inventories lightening up, the aging inventories are cleaning up as well. The USDA took a small step down on select sizing, and border pricing appears stable. Demand continues to be lack luster and as conversations turn to Cinco de Mayo, it's time to get creative with planning out marketing and POS to capture the holiday lift. Market outlook for April – the first half we can expect higher pricing leading up to and through Holy Week as volumes out of Mexico will be limited for the holiday. Second half of the month, we can hope for lower pricing levels but there needs to be a significant event to push the needle down and unless Mexico starts consistently crossing 55+ Mil lbs. per week, these current pricing levels can easily carry us into Peru arrivals.

MARKET ALERT

Bananas



SUPPLY
GOOD
QUALITY
GOOD

Banana availability is picking up and so is the quality. The weather is improving and the issues in Europe are increasing the supply as less fruit is being shipped there.

MARKET ALERT

Berries



SUPPLY
BAD
QUALITY
BAD

Blackberries ALERT: Prices for Blackberries are trending up this week. Growers out of Mexico are working through quality issues during packing. This is impacting volume and prices.

Blueberries: Prices for Blueberries are stable this week. Production is coming out of Mexico and Florida. Florida is seeing lighter volumes due to cold weather. Georgia is expected to come online during the first of April. Supply is Fair and Quality is Good.

Raspberries ALERT: Prices for Raspberries are trending up this week. Growers out of Mexico are working through quality issues due to high temperatures under hoops. Cool weather has impacted production in Florida and Georgia. Look for tight supplies over the next few weeks.

MARKET OUTLOOK



SUPPLY

Beans Green

FAIR

QUALITY

FAIR



Growers in East coast are seeing better quality on the beans and supplies remains good. Supplies on the West coast are getting tight due to Mexico having rain in the past few weeks along with lack of labor. Quality is fair to good, and prices are elevated.

SUPPLY

Broccoli

FAIR

QUALITY

GOOD



Supplies will continue to be steady this week. Growers are currently reporting good yields. Quality is also reported as good. We are fully transitioning Broccoli from Yuma AZ to Salinas CA next week. (F.O.B pricing for this week \$9.75 - \$10.75)

SUPPLY

Brussels Sprouts

GOOD

QUALITY

GOOD



Supplies continue to be very good this week. Good quality is reported as good at this time. Growers are reporting improved yields, expect steady supplies for a few weeks. Good time to promote Brussel Sprouts. (F.O.B pricing for this week \$15.65 - \$16.95)

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



Cantaloupe production is currently peaking from Guatemala but less acreage being farmed this season is being realized as strong retail and increasing foodservice demand has caused the market to strengthen which is not common in the middle of March. With Springtime promotions continuing as temperatures warm, on top of a late Easter, we anticipate this stronger demand to continue. Sizing has started to shift to more premium sizing (9/12s) compared to being heavier in the 12/15 range. We are beginning to see quality reach optimum levels with improved external color and a higher range of brix results. This trend should continue until this deal finishes in late May.

MARKET ALERT

SUPPLY

Cauliflower

SHORT

QUALITY

GOOD



Supplies continue to be very short 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 for another few weeks until we transition from Yuma AZ to Salinas CA. (F.O.B pricing for this week \$23.10 - \$24.55)

MARKET OUTLOOK

MARKET ALERT

Celery



SUPPLY
SHORT
QUALITY
GOOD

Supplies continue to be short this week. Quality is reported as good. Expect supplies to be limited for another few weeks. Celery will be moving to Oxnard CA and Santa Maria CA. (F.O.B pricing for this week \$20.50 - \$21.50)

MARKET ALERT

Citrus



SUPPLY
FAIR
QUALITY
FAIR

Limes ALERT - FORCE MAJEURE: Cost on large fruit remains elevated as volume peaks on smaller sizes. There will be a significant pricing gap between specs throughout the remainder of March into April. The market is expected to remain relatively stable, although costs on small fruit will begin to decline. Market trends are not expected to normalize until the last week of April/first week of May. Additionally, weather conditions in Mexico are affecting crossings, we can expect lower crossings this week and continuing into next. Demand trends will dictate the velocity of further cost shifts. **During this time, please plan supply in advance and be open for any size available.**

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.

MARKET ALERT

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. Growers in Florida are expecting some price relief in the weeks to come. Mexico is keeping the needs for the West covered. Growers are expecting tight supplies for the 4th of July holiday. Growers are suggesting pre-orders prior to the holiday so that they can line up supplies.

MARKET ALERT

Cucumbers



SUPPLY
FAIR
QUALITY
FAIR

Prices for Slicing Cucumbers are steady this week. Product out of Honduras is coming to an end. The Spring crop out of Florida is ramping up and that should take some pressure off pricing in the weeks to come. Production out of Mexico has been hampered by cold weather. Growers are looking for production to pick up as warmer weather sets in.

Eggplant



SUPPLY
FAIR
QUALITY
GOOD

Prices for Eggplant are trending up this week. Supplies are tight out of South Florida. Plant City is forecasting production to begin in mid to late April. Mexico is seeing adequate supplies and will keep the West covered until the California desert comes online.

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. Import is on the low side for now but, will show a slight increase once we see the delay on cargo ships again next month.

MARKET ALERT

Grapes



SUPPLY
GOOD
QUALITY
GOOD

Weather in Chile is going perfectly for grapes and has been for a few weeks which is increasing the supplies being imported into the US. Red Grape pricing continues to be low with plenty of supply. Greens remain higher as fewer supplies have been shipped.

Honeydews



SUPPLY
FAIR
QUALITY
GOOD

Honeydew supply remains in a very limited overall position. We are seeing a big shift in sizing away from strong volume of 6/8s to more 5/5Js. This will cause the smaller sizes to eventually fetch premium once arrivals begin hitting. Dew quality is much improved from what was being received earlier in the season. External quality has been clean besides the occasional scarring and internal quality has also shown a higher range of brix levels as we continue to experience days with longer sunlight hours.

MARKET ALERT

Iceberg



SUPPLY
SHORT
QUALITY
FAIR

EXTREME ALERT: Supplies continue to be very short this week. Quality and Weights will be only fair at this time. Expect for weights to be on the lighter side. Growers are expecting supplies to be limited the next few weeks until supplies improve in Huron CA and Salinas CA. (F.O.B pricing for this week \$31.50 - \$32.50)

MARKET ALERT

Leaf



SUPPLY
GOOD
QUALITY
FAIR

Romaine EXTREME 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 \$31.95 - \$32.48) (Romaine Hearts pricing for this week \$41.48 - \$42.48)

Green & Red Leaf Lettuce: Supplies have improved this week. Growers are reporting better yields. Quality is reported as only fair with light color and some fringe burn. Supplies will continue to improve as we transition to Salinas CA. (F.O.B pricing for this week \$12.60 - \$14.95)

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: 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. 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.

MARKET ALERT

Onions



SUPPLY
FAIR
QUALITY
FAIR

EXTREME ALERT: Onions supplies continue to get tighter as NW crop ends a month early causing some shippers to gap until May. 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 continues to be a concern and not lasting on the supply that is left either.

Onions Green



SUPPLY
GOOD
QUALITY
GOOD

Supplies have improved this week. Market pricing has improved and should continue improving. Supplies coming from Mexico will be steady the next few weeks. (F.O.B pricing for this week \$9.75 - \$10.25)

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, Yellow and Red Bell Peppers are trending up this week. Growers out of Florida are forecasting supplies to pick up over the weeks to come. California is forecasted to start picking in the middle of April out of the desert area. Production out of Mexico is expected to remain tight for at least the next couple weeks.

MARKET ALERT

Peppers Chili



SUPPLY
FAIR
QUALITY
FAIR

Prices for Chili Peppers are mixed this week. Production out of Florida is hit or miss as production winds down on the winter crop. The spring crop isn't forecasted to support with adequate volume until the end of April. Mexico will be transiting to their spring crop in a few weeks. Until then, look for inconsistent supplies.

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 steady this week. Production out of South Florida is lower than usual. Growers are also reporting some quality issues due to wind damage. Look for the Plant City area to come online in early April. Mexico was impacted by some cold weather last week. The winter and spring crops were impacted. Looks for tighter supplies over the next couple weeks.

Strawberries



SUPPLY

GOOD

QUALITY

GOOD

Prices for Strawberries are stable this week. Production currently is coming out of Santa Maria, Oxnard, Florida, and Mexico. Florida and Mexico are on the tail end of the season and working through end of season quality issues. Growers are looking for volumes to ramp up out of California over the next few weeks.

Tomatoes



SUPPLY

GOOD

QUALITY

GOOD

Prices for Tomatoes are trending up this week. Production in Florida is down this week. Plants were impacted by bloom drop from the freeze in late February. Production is forecasted to work its way up to the Ruskin FL area in mid-April. Production out of Mexico is currently down a bit this week too. Mexico's spring crop is forecasted to start towards the front end of April. Look for tighter supplies over the next couple weeks.

Watermelons



SUPPLY

FAIR

QUALITY

GOOD

Expect to see a slight gap in production on the seedless watermelon with only limited arrivals anticipated. Mexican supplies are drastically reduced shipping out of Texas and Arizona. Offshore volume arriving in Florida is limited. Domestic Florida is starting with light volume.

Higher celery pricing likely to stay for the near future

Celery supplies out of California are lighter currently and will probably remain that way for the next few weeks.

“At this point, we’ve been harvesting ahead of the growing schedule and now everything is catching back up and getting back to normal growing days. That’s lightened up the supply side of it,” says Russ Widerburg of Oxnard, CA’s Boskovich Farms Inc. “We actually had good volume all the way through January and February and the market was kind of ho-hum. But once we got to the end of February and into March, that’s when it started lightening up and it’s created a bit of a spike in the market.”

For Boskovich, celery supplies are coming out of Oxnard, CA, a region where its celery comes from for nine months of the year. At the end of June through September, the growing region switches over to Lompoc, CA. “Right now there’s still some product in Santa Maria and also Coachella and Brawley, El Centro and some is grown in Yuma, AZ too,” says Widerburg. “Probably 60 percent of the national volume is grown in Oxnard. And there’s also product coming out of Mexico and Florida.”

Celery demand and freight rates

Meanwhile demand is good for celery, though high freight rates make it challenging. “Celery is one of the last things people put on a truck as filler because the freight rate is compromised due to the lack of units you get on a load. But demand has been good for the supplies that are out there now,” he says.

That aforementioned spike is in the \$20-\$22 range now. “It’s been on a gradual increase growing by \$1-\$2 increments. That’s why we think the price should hang out there for a month or so,” Widerburg says. “There’s optimism that pricing should stay good at least through the front part of spring.”

Looking ahead, a growing region transition happens at the end of March and into early April. That’s when celery will finish up out of the Southern districts of Mexico and Coachella and transition to the Santa Maria/Oxnard area. “And usually with a transition, you have lighter supplies because people don’t tend to overlap a whole lot,” adds Widerburg.

He also notes that the celery market is long overdue for a price catch up. “We had a \$60-\$70 market two years ago and since then it hasn’t been really good. It’s the first time we’ve had a sustained spike in the celery market in a few years,” he says.

For full story: <https://www.freshplaza.com/article/9410197/higher-celery-pricing-likely-to-stay-for-the-near-future/>

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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

