

Market **OUTLOOK**

Week 25: June 17 - 23, 2024



Market ALERT

- Apples
- Avocado
- Beans
- Broccoli
- Cauliflower
- Celery
- Citrus
- Grapes
- Herbs
- Lettuce
- Onions
- Pepper Chili
- Squashes

transportation

Nat'l Diesel Avg: \$3.429↓

Last Year: \$3.263↓

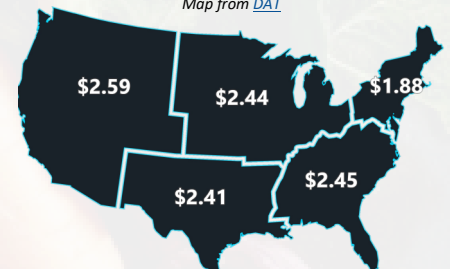
Nat'l Fuel Surcharge: \$0.45

Shortages: Freight rates is flat

- extreme - None
- slight - None

National Posted Rate per mile

previous week's average outbound reefer rate for each region
Map from [DAT](#)



weather **OUTLOOK**

Oxnard, CA: Partly cloudy with highs in the 60s and lows in the 50s.

Salinas, CA: Partly cloudy with highs in the 60s and lows in the 50s.

Yuma, AZ: Sunny with highs in the 100s and lows in the low 70s.

Immokalee, FL: Mostly cloudy and tunderstorms with highs in the upper 80s and lows in the 70s.

Idaho Falls, ID: Partly cloudy, windy and sunny skies with highs in the 60s to 80s and lows in the 30s to 50s.



Market UPDATE

apples



RADAR (Gala) Washington is assessing Gala crop inventory due to tight Q2 market conditions, suggesting moving Galas to Fujis until September due to limited availability.

asparagus



Mexican and Peruvian production has improved due to market normalization, while Washington, Michigan, and Canadian production remain available. White asparagus remains scarce from Peru until mid-July.

avocados



RADAR Stronger markets are expected through June and early July, with Mexico's normal crop winding down. California, Peru, and Colombia are strong, but Mexico still holds 56% of the market share. 48ct and larger fruit will tighten quickly, with smaller fruit facing similar challenges but may be a better option.

bananas



Fruit is continuing to show great overall quality, with strong inventories arriving over the next several weeks at all ports.

beans



Green Beans: Heat in Georgia is causing limited production and an increasing market due to the transition of growing regions north.

Snow Peas: Guatemalan and Mexican supply are facing challenges due to heat, lack of rain, and growing region transitions, with volumes being held and market escalation.

berries



Blackberries: Prices are stable with good quality. Mexican fruit is showing a nice sheen and color, occasional regression, and overripe fruit. Volumes are steady, though light, in Watsonville as the season begins.

Blueberries: Prices remain stable, with good quality. However, soft fruit in the Central Valley and flower debris and shriveled fruit in Mexico may occur due to hot weather, with volume starting to decrease. Production is expected to decrease in Florida and Georgia.

Raspberries: Prices are stable and quality remains good, with occasional light-colored fruit from Mexico. Volumes are steady, though light, in Watsonville as the season begins.

Strawberries: Prices are slightly up, Santa Maria yields good quality with occasional bruising, and strong volumes, while Watsonville/Salinas reports good quality with bruising and overripe fruit.

broccoli



Broccoli: EXTREME The supply situation is light and demand is good, with supplies coming from Salinas and Santa Maria. Mexico has limited supplies, and the quality is only fair. Market pricing is active and will escalate this week.

Brocolini: Supply is on budget and demand is good, with better quality as production transitions back to Salinas. Harvesting is steady, and contract pricing will not escalate.

brussels sprouts



The supply has improved, with good quality and demand. Market pricing has also improved, and it is expected to remain steady in the coming weeks. It's a great time to promote.



Market UPDATE

cabbages



Supplies are steady and of good quality. Availability from Oxnard and Salinas, and the markets and supplies, are expected to remain stable in the coming weeks.

carrots



New crops are on the horizon, with improved supply and quality going forward.

cauliflower



The supply is light and demand is good, with supplies coming from Salinas and Santa Maria. Mexico has limited supplies, and the quality is fair. Expect limited supplies in the next few weeks. Market pricing is active.

celery



Supply is improving, with current supplies coming from Santa Maria and Oxnard, and production has started in the Salinas region. Quality is reported as improving, and steady supplies are expected in the next few weeks.

citrus



Limes: RADAR Cinco de Mayo is impacting the limes, with rain and sun patterns favoring small sizes. If this trend continues, 110s and 150s will be tight, potentially pushing the overall size spectrum and necessitating an opening size spec.

Lemons: ALERT The industry relies heavily on CA D2 from the Ventura/Riverside area, but is facing high unusable fruit going to juice due to heavy on larger size and quality pressure on the 140-200s market. Demand exceeds supply, and imports from Argentina and Chile are on the horizon. Argentina's heavy size and large shipments may not help alleviate the small market. Chilean

imports are expected to arrive in mid-July and run larger, while Mexico is the only alternative. Mexico is running smaller, requiring it to be open and flexible with sizes.

Oranges: The transition from CA Navels and FL Valencia to CA Valencia has been completed, with sizing peaking at 72/88's and 113's. The industry may continue with Valencia through the summer, but foodservice sizing will become scarce in August, September, and October. Communication with receivers and sizing up will be crucial. An alternative is to take import Navels and load in New Jersey.

corn



Pricing is steady. Supplies are plentiful and of good quality in Georgia. It's a good time to promote.

cucumbers



Pricing is steady. Georgia has good supplies, but recent rains have affected quality. Hot temperatures in Mexican growing regions are causing some quality issues. Baja offers the best quality, but volumes are low.

grapes



RADAR The Mexican Flame crop faces challenges in size and green seedless availability, but overall quality is good to excellent.

herbs



ALERT (Dill) Basil and oregano have improved, while dill is still under watch due to the weather.

Cilantro: ALERT Supply is limited, with less than fair quality. Market pricing has increased, and supplies are shipping out of Oxnard and Salinas. Expected supply shortages and increased markets in the coming weeks.



Market UPDATE

kale



Supply is steady with good demand and quality. Supplies and market prices are expected to be steady for the next few weeks.

lettuce



Green & Red Leaf: The supply is good, with improved quality and weights. Market pricing has also improved, and contracts are expected to return to normal pricing in the next few weeks.

Iceberg: **EXTREME** The supply is expected to be light and fair, with lighter weights and smaller heads. Markets are expected to remain increased, and contract pricing will escalate next week. The next few weeks are expected to be active in the markets.

Romaine: **ALERT** Supply is improving with fair quality and good demand in Salinas and Santa Maria, with expected continued improvement in markets in the coming weeks.

Tender Leaf: The supply is expected to remain steady, with good to fair quality and good demand. Most have transitioned to Salinas, and improvements are expected in the next few weeks.

melons



Cantaloupe: Production is increasing, with 9ct fruit sizing, but limited smaller sizing. Quality improves with higher color and brix levels in the 13-16% range. Good volume from the desert for a couple of weeks before transitioning to California.

Honeydew: Yuma production has increased due to heat, with sizing shifting from 6/8s to 5s. Desert fruit quality is good, with external scarring from higher spring winds. Brix levels are in the 12-14% range.

Watermelons: Production is good in California, Florida, Georgia, Mississippi, and Texas with good demand with Arizona starting.

mushrooms



The weather has improved the quality and supply of brown and white, indicating a steady supply for the next few months. It's a good time to promote.

onions



RADAR The quality is good in all growing regions, with steady demand. Market prices are down slightly, with red remaining elevated for another couple of weeks. New Mexico has started giving some relief. The reds will be tight through the summer.

onions green



Supplies are steady, primarily from Mexico, and demand has increased. Warmer weather is expected to improve supplies, and market pricing and quality are expected to improve in the coming weeks.

pears



Bartletts and Bosc are done for the season, with some available but at a very high market price. Avoid them and switch to D'Anjous if possible, which will be available until next season starts.

peppers bell



Pricing is steady. Georgia has a good supply for the east. The California desert is yielding good numbers and quality products to supply the west.



Market UPDATE

peppers chili



Pricing is high. Georgia has started, but supplies of Poblanos and Serrano remain limited, keeping prices elevated. Mexico has good volumes to alleviate pricing pressure on the west coast, though Serrano and Poblanos remain high.

pineapples



Supplies remain tight, and size curve availability fluctuates weekly, requiring flexibility in sizes. Better availability on all sizes expected mid-July.

potatoes



The market is flat, with good quality. Idaho is shipping Burbank with a sizing profile smaller than Norkotahs, which is causing the 40–60ct price to increase and be a bit short. Idaho has plenty of availability, making it a good time to promote potatoes.

squash



Pricing has escalated due to extremely limited supplies. Georgia is still recovering from the recent weather. Supplies are expected to improve, but demand remains high, keeping availability tight. Cooler temperatures in California are limiting supplies in the west.

tomatoes



The market remains firm. Florida is winding down in the east with a fair volume. Georgia has started, which will help with supply. East Mexico and Baja are seeing increased volumes with good quality.

commodities alert overview

Gala apples are expected to be tight until September. **Green beans** are limited due to the weather in Georgia. **Broccoli** are on extreme alert with light supplies. **Iceberg** are on extreme alert with light availability. **Lemons** are peaking on large fruit, with small fruit being limited. **Chili peppers** are on remain high with poblano and serrano being limited. **Zucchini and yellow squash** are extremely limited due to the weather in Georgia. It's a good time to promote **Brussels Sprouts, Corn, Mushrooms and Potatoes**.



Market UPDATE

in the news...

Attracting the next generation to the produce industry

By **CHRISTINA HERRICK** | June 10, 2024 | THE PACKER

PALM DESERT, Calif. — As labor continues to be a major struggle for the produce industry, the 2024 West Coast Produce Expo brought together a panel of college professors and future college graduates to discuss the opportunities and challenges to the next generation pursuing a career in fresh produce.

Panelists Adam Brumberg, a researcher at Cornell University's Charles H. Dyson School of Applied Economics and Management; Koushik Saha, a professor in the industrial technology, packaging and entrepreneurship academic area at Cal Poly State University, San Luis Obispo; Jayna Kaur, a student at Cal Poly State University, San Luis Obispo; and Kaylee Yin, a student at Cornell University, joined moderator Mary Maranville, founder

and director of the nonprofit Students for Eco-Education and Agriculture, for an interesting look at careers in produce.

Saha said attracting the next generation into the produce industry needs to go beyond name recognition, as the next generation wants to understand how their role would affect the business.

"[The students] may know the name of big business, but unless there is some campus visibility with regard to visiting students at a club meeting or guest speakers or a lecture, the big name is meaningless, unfortunately," he said.

Brumberg agreed, noting many students enter Cornell's College of Applied Economics and Management with dreams of working for Goldman Sachs or KPMG, but they do not realize

how critical technology and data will be in the produce industry in the future — which unlocks a lot of potential career paths.

"We all know that the food space is the fastest-growing tech sector in the economy, partially because we're so far behind," he said. "There's so many opportunities. ... The more that we can talk about how technology is becoming part of the produce industry and the industry in general, the more young kids you're going to you're going to attract."

Saha said this is especially important as produce packaging becomes a bigger focus in the future of the industry. Students need hands-on experience to understand the role produce packaging plays in the industry and also...

[Read full article HERE](#)



If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to jhoppe@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!

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