

# Market Report

11/8/21 – 11/13/21

**WEATHER** -- With light rain on Monday [thankfully post-harvest], High pressure returned Tuesday causing a warming trend through mid-week, but a similar system arrives late Wednesday night dropping up to another quarter inch or less of rain through sunset Thursday. High pressure moves back into the region Fri slowly warming temps. Again, rain is forecasted for Thursday in the Salinas Valley however no rain is predicted in Huron. The desert weather is very nice as we will start Iceberg next Thursday in Yuma.

**EXTENDED WEATHER** -- Near to above average temps is expected through mid-month with a few degrees of cooling every few days as systems pass to the north increasing onshore winds.

**AVOCADO** -- Volume, once again, continues its climb back up from a low 4-5 weeks ago. Pricing has somewhat leveled off last week and we are anticipating this trend to continue with slower than previously predicted pricing reductions.

**ARUGULA** -- Overall good quality & performance. We will continue to watch shelf-life performance after rain event. As of right now, supplies are good.

**ASPARAGUS** -- Weak demand and plentiful, quality supply drives asparagus prices lower for the third week in a row. Asparagus prices are at a ten-year low by a healthy margin. Consistent Mexican supply will continue to drive prices lower and set more records along the way.

**BEETS** -- Sweet and earthy, beets are one of my favorite seasonal vegetables.

**BOK CHOY** -- Production is slowing down. Quality, color, and sizing are fair.

**BROCCOLI** -- Light supply & meeting demand. Seeing good quality and color.

**BRUSSEL SPROUTS** -- Overall sprout volume looks to be normal and on track for the coming week. Quality is good with minor defects, good shape and color.

**CABBAGE** -- Supplies are light. Quality remains consistent with sizing and overall appearance.

**CARROTS** -- Demand is outpacing supply for school packs and bulk sizes.

**CAULIFLOWER** -- Overall good supply for current demand. Quality, sizing & texture look good.

**CELERY** -- Business is better this week as demand for the holidays increase. Good supplies for us and on the west coast. Quality is good and the market is higher in Salinas.

**CILANTRO** -- Crop sizing has been a challenge in the field. Quality concerns currently are bacteria leaf spotting. Supplies are a little light this week and demand of course has picked up.

**GREEN ONIONS** -- Quality is good this week. Market is extremely active due to supply shortage with many growers in northern Mexico because of the extremely hot weather and high humidity the past two months.

**HERITAGE BLEND** -- Overall good quality & color.

**KALE** -- Supplies are expected to be plentiful for the next few weeks

**LETTUCE** -- Iceberg lettuce nears an all-time high! Iceberg is as close to gold as a fresh produce commodity will ever be. Iceberg lettuce prices have soared 60% in the past week, hitting a 10-year high, as the main US growing region prepares to transition from California to Arizona. Several have revised their forecast and now expect tight lettuce supplies and high prices to continue into mid- December. Higher lettuce prices are typical during the period of transition, but greater-than-usual production declines this year in the Salinas, California, area and a slow start for the new Yuma, Arizona, crop are pushing prices higher and will raise costs for produce

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retailers and food service companies across the country. Prices are up over the previous week and are forecasted to continue climbing due to a rain damaged Mexican crop.

**LEAF / ROMAINE** -- Romaine lettuce harvest volumes have also declined, but by a much smaller 8% in that period. Still, romaine prices have moved higher in sympathy with iceberg prices and are up 50%, in the past week, just below a 10-year high. Meanwhile, the Yuma, Arizona, growing season is getting off to a slow start, as another week of below average temperatures increases the likelihood of lower early-season yields. That could further complicate the iceberg and romaine market once growers complete their move to Arizona, likely around the third week of November. On Salinas Green Leaf production continues to decrease weekly. Quality is fair with a good green color, good texture, and slightly lighter in weight. Demand is good and pricing is slightly stronger.

**MUSHROOMS** -- The current market forces of global supply chain shortages, transportation availability constraints, and a drastically reduced farm labor market combined with seasonal threats of crop disease are heavily negatively impacting U.S. mushroom production, resulting in the forecast of a significantly reduced mushroom holiday supply capability. Because the mushroom growing process integrates many other industries' products into the growing medium for mushrooms, when availability for any single ingredient is compromised, it impacts growers' ability to mitigate crop threats and to maximize yields. Mushroom farms are doing what they can to push back against these headwinds, but the reality is that the 2021 holiday season will see greatly reduced salable mushroom pounds than in previous years. Additionally, the mushroom industry is fighting these challenges with a workforce of about 75% of the labor force needed to do the job. The result of all these pressures—insufficient raw materials availability, crop disease, transportation constraints, and labor shortages, is lower supply than in previous years during the holiday season.

**NAPA** -- Supplies are about steady this week. Demand continues to be strong and market prices remain elevated.

**ONIONS** -- the market has been steady this week. Demand is even for mediums all the way up. Reds are hot, and whites are hot now, too. The good news is 95 percent of the crop is in storage now, ahead of the weather turning cold. Quality is good. Other than the yields and sizing, which are down, everything else is good. In summary, Pro Mark will have adequate supplies.

**PARSLEY** -- supplies are expected to be plentiful for the next few weeks

**PEPPERS** -- We have started our green bell harvest in Coachella this week with good supplies of Large, Medium, and Choice. XL and larger will be light all week as peppers will need to size up. Red and gold bells are very tight from our Oxnard farms. We should see some relief in the next 10 days when we begin our Baja production

**CUCUMBERS** -- Demand has really picked up this week. Supply should pick up this week as more products will be coming into Nogales from Mexico.

**SQUASH** -- Zucchini and yellow squash volume may dip this week due to cooler weather in Mexico. Increased demand with lighter production will firm the markets up.

**POTATOES** -- Favorable weather conditions during the weeks of fall potato harvest have helped guarantee a superior quality product for the remainder of the year and well into 2022.

**SWEET POTATOES** -- The quality of this year's crop looks good. The sizing is average in our crop. We don't have as many large to jumbo this year. Overall, the crops look healthy. Currently, prices are like last year despite the fact that sweet potatoes are still a growing commodity.

**SPINACH** -- Overall good quality, size, and slight light texture. Cooler weather patterns expected to slow down supply.

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**SNO PEAS** -- Low volume, high demand, and good quality. Supply affected by major logistic Issues

**SPRING MIX** -- is a blend of tender baby lettuces and other greens. The exact mix can vary depending on the season and supplier, but common components include baby green and red romaine lettuces; baby green and red oakleaf lettuces; baby Greenleaf and red leaf lettuces; baby green and red butter lettuces; baby green and red chard; baby spinach; arugula; beet tops; frisee; lolla rosa; mache; mizuna; radicchio; tango; and tatsoi

### **TOMATOES --**

**CHERRY:** Markets remain steady, but we are seeing them dropping lower as Florida increases production. On the west coast, cherries are still very expensive. Quality is good out of Florida and our "eyes" are telling us the cherries look good out west too.

**GRAPE:** Market is coming down this week. Florida is in heavy production and has a lot of volume. Mexico is following Florida's lead on the market. Overall quality seems good from both areas.

**ROMA:** increased availability this week causing markets to adjust down overall. Markets not reaching "cheap" levels but being priced where they can keep product moving. Roma's crossing from mainland Mexico, mainly through McAllen, have the lowest pricing. However, buyers are cautious because although there is plenty of high-quality product coming from McAllen, there are signs of some product showing quality defects out of McAllen. Roma's crossing through Baja mainly stays west of the Rockies. Quotes are higher but also trending down. Same scenario in Florida.

**ROUNDS:** Markets seem to be getting slightly easier. California is mostly done for the season. Word on the street is a few growers are going back in for one more round of harvest, but rain is expected to hit California later this week and that will knock them out. Quality is poor from the remaining crop out there. Florida is up and running on all cylinders. Quality is good from what we are seeing. Surprisingly the markets seem to be holding on Florida product and perhaps may be getting weaker as production ramps up. Demand on all product continues to be good currently.

**APPLES** -- prices typically peak around week #40 and steadily decrease as domestic supply lessens the pull of demand on markets. Apples aren't the most expensive they've ever been, but they certainly aren't cheap. Due to poor yields and wanning harvest in Washington, week #43 prices are at their third highest in the last five years.

**BLACKBERRIES** -- Supplies of blackberries are starting to increase out of Mexico.

**LEMONS** -- Good supplies

**LIMES** -- Market is about steady, with much improved quality.

**ORANGE** -- While supplies generally are strong, overall the volumes look to be shorter this year in the U.S.

**KIWI FRUIT** -- California kiwi available size peaking on 33 and smaller. Chilean kiwi continues to be available but limited due to vessel delays.

**CANTLOUPES** -- Due to a couple major issues, cantaloupe supplies are extremely limited. First, in southwestern Arizona (Yuma District), cantaloupe crop has been devastated by virus (white fly) causing growers to get only 30% to 40 % of their crop harvested. And at this time, it will not get any better through the rest of the season. Secondly, imported cantaloupes coming out of Mexico into Nogales has been very limited due to a better national market demand, therefore very few loads of cantaloupes are crossing each day. However, this will hopefully change as we get into early December, but until that time, cantaloupe crossings via Nogales will be limited.

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**POMEGRANATES** -- The rain's effect on pomegranates is also concerning, particularly given the California pomegranate crop was already down thanks to severe winds that caused some scarring on the fruit. The water is turned off on pomegranates just before harvest to bring the sugars to the fruit and when the rain hits water-stressed fruit, it captures the water and swells the arils and cracks the fruit. With this rain, we could be down 30-40 percent. It made a short crop shorter

**RASPBERRIES** -- As we move through November and into December, overall volumes will decline. With the rain, even making it into Santa Maria look for the fruit to be a little softer, but with great flavor. Raspberries over French Vanilla ice-cream should be a dessert menu option next week.

**STRAWBERRIES** -- Despite the beneficial rain, the torrential weather did leave an innocent bystander in its wake. What was left of the Salinas/Watsonville strawberry crop suffered loss due to the intense wind and rain. The rain triggered both Salinas and Watsonville to be pulled out of production as both areas received significant amounts of rain. Between the storm, limited Mexican supply and the delayed start to Southern California's season, strawberry markets are tight. Expect to see continued price volatility as markets impatiently wait for the arrival of So-Cal supply. Field inspections in both Santa Maria and Oxnard, show very minimal fruit damage. With favorable weather forecast, volumes should increase in both areas over the next few weeks.

**WATERMELONS** -- We are seeing an up market with sizing becoming much smaller. Lighter supply available out of the Midwest, and Texas. Quality is still good.

*Market Report Summarized from our friends at Legacy Foodservice and ProMark*

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