

Market OUTLOOK

Week 1: Dec. 30, 2024 - Jan. 5, 2025



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Market ALERT

Asparagus
Beans
Berries
Broccoli
Brussels Sprouts
Cabbage
Cauliflower
Celery
Grapes
Herbs
Melons
Mushrooms
Pears
Peppers Bell
Pineapples
Tomatoes

transportation

Nat'l Diesel Avg: \$3.476↓

Last Year: \$3.038↓

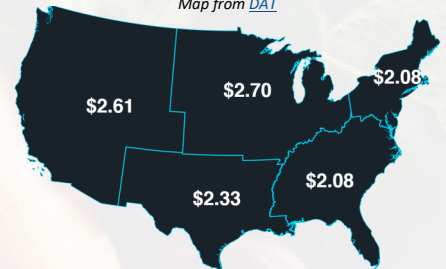
Nat'l Fuel Surcharge: \$0.41

Shortages: Freight rates is flat

- extreme - ID & WA
- slight - FL

National Posted Rate per mile

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



weather OUTLOOK

Oxnard, CA: Cloudy and sunny skies with highs in the 60s and lows in the 50s.

Salinas, CA: Cloudy and sunny skies with highs in the 60s and lows in the 40s.

Yuma, AZ: Partly cloudy and sunny skies with highs in the 70s and lows in the 40s.

Immokalee, FL: Partly cloudy and sunny skies with highs in the 80s to 60s and lows in the low 60s and 40s.

Idaho Falls, ID: Cloudy and foggy with highs in the 30s and 20s and lows in the 20s and mid-teens.



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Market UPDATE

apples



Washington's 2024 crop is expected to be of outstanding quality due to favorable growing conditions. Red delicious, gold delicious, granny smith, gala, and fuji have decreased. Cosmic has increased, with 2.8 million boxes. As Washington faces a 12 million box deficit, prices are expected to rise. Despite this, there is still ample fruit to ship year-round.

asparagus



Prices are escalated. Production in southern and northern Baja is low due to seasonal factors. Northern Sonora, particularly Caborca, is experiencing very low volumes and will continue to do so until the climate warms. Peruvian volume is also decreasing due to quality and seasonality, leading to increased market prices.

avocados



The market reacted due to the low volume crossing the border, a normal pattern for this time of year. Mexico fruit will remain normal for several weeks. The transition to Marcena is expected to ease stress with big sizes. If current market levels persist, an early domestic season entrance is expected, supplying good volume for the Super Bowl. Storage is recommended at 41°F.

bananas



The market continues to be steady, with strong supply and excellent quality. Supply chains are operating smoothly, with no expected disruptions in the coming week.

beans



Green Beans: Prices remain escalated with good supplies and quality and steady bushel pricing.

Snow Peas: Prices are steady. Guatemalan production continues to improve this week and should be better next week.

berries



Blackberries: Prices are steady. Quality and volume are fair, with steady supply expected for the rest of the year from Mexico.

Blueberries: Prices are stable. Mexico's conventional and organic quality is good, with minor shrivel and leaky fruit occurrences and steady volumes. Peru offers excellent quality with similar minor issues and weekly shipments. Chile has outstanding organic produce, with a steady volume that peaks around the middle of January.

Raspberries: Prices are steady. Good quality, displaying a vibrant red color, promising sizes, and steady volumes from Mexico.

Strawberries: **ALERT** Prices are trending up. Santa Maria has good fruit quality with some decay, and volume is stabilizing; however, estimates for this region are expected to decrease by the end of the year. Florida's fruit quality is good, with production anticipated to increase as the weather warms. Mexico is seeing steady improvements in quality and increasing production volumes through January.

broccoli



Broccoli: Supply is improving with decreased demand. Supplies coming from Yuma and Mexico. Marketing pricing and contracts are escalated for the next few weeks.

Broccolini: Supply is improving with decreased demand and good quality. Improved supplies are expected in the next week along with market pricing.



Market UPDATE

brussels sprouts



The supply is steady, quality has improved, with good demand and increased market pricing. Supplies are now coming from Mexico, markets are expected to remain steady for the next few weeks, and a popular item during the holiday.

cabbages



Supplies are light with increased market pricing. Growers are reporting field-level challenges and fair quality, with products coming from Oxnard and Yuma.

carrots



The market is stable with steady supply and quality, but minor sizing challenges are expected due to recent growing conditions. These issues are expected to resolve soon, and availability remains strong with no major disruptions forecasted.

cauliflower



The supply is light, and demand is decreasing with fair quality. New crops have started in Yuma, with some supplies from Mexico. Market pricing is expected to escalate for the next few weeks.

celery



Supply is light, coming from Santa Maria and Oxnard, with good quality. Supply is expected to be limited due to holiday demand, and market pricing will be escalated in the coming weeks. Market pricing is expected to improve as demand decreases.

citrus



Limes: Pricing is trending upward. The current

growing areas are starting to wind down and will be transitioning into new crops. Smaller-sized is still commanding a higher price, as the existing fields are yielding larger fruit. However, this is expected to change in January, as the newer fields are anticipated to produce smaller fruit in the beginning.

Lemons: Pricing is steady. District 1 and District 3 are packing fruit. Fruit is packing larger than the last few weeks with good quality.

Oranges: Pricing is steady. There is some larger fruit available to harvest but not in promotable numbers. 88s, 113s, and 138s remain the peak sizes. Quality is good, and the fruit is eating well.

corn



Pricing remains firm, with limited supplies coming from the east due to planting gaps created by hurricane weather earlier in the year. Better quality and more consistent supplies are coming from the west, with supplies crossing through Nogales.

cucumbers



Pricing is steady. Florida's supply is low and will continue to decrease through the winter. Imports from Honduras will help supply the east going into January. Steady volumes are coming from Mexico, and supplies will remain strong as production shifts south and more growers come online.

grapes



The prices are escalated. Demand for imports on both coasts has far exceeded supply. This trend is expected to continue until the new year, but signs indicate better volumes arriving just after Christmas, with some relief anticipated in mid-January.



Market UPDATE

herbs



Thyme and **tarragon** are limited on the east coast, with tarragon being extremely scarce. On the west coast, most, if not all, herbs from Mexico are experiencing limited availability due to ongoing weather conditions. This is expected to persist until temperatures warm up.

Cilantro: Supplies are on budget, with only good quality. Demand has increased, and supplies are shipping out of Oxnard and Yuma. Expected supply limitations for the next few weeks with escalated market pricing.

kale



Supply and market pricing are steady with good demand and quality.

lettuce



Green & Red Leaf: The supply and quality have improved along with size and weight, with decreased demand coming from Yuma. Market and contract pricing is back to normal.

Iceberg: The supply and quality have improved along with size and weight, with decreased demand coming from Yuma. Market pricing is expected to be steady in the coming weeks.

Romaine: Supply is steady with lighter demand causing the market to soften from Yuma. Quality has improved along with size and weight. Market pricing is expected to improve in the coming weeks along with supplies.

Tender Leaf: Improved supply and quality with good demand. Cooler mornings are causing a slower growth rate in Yuma.

melons



Cantaloupe: **RADAR** Prices are escalated. The

markets are currently experiencing volatility due to reduced early season volume and recent weather events, leading to lower arrivals. Sizing is shifting towards smaller fruit instead of jumbos. Additionally, the fruit is exhibiting a greener shell color, and brix levels have slightly declined from 10% to 13%.

Honeydew: **ALERT** Prices are escalated with high demand but are experiencing limited supply, causing shortages at ports. Central American production will likely struggle for three to four weeks, with conditions expected to improve by late January.

mushrooms



Quality is good, but yields are fluctuating. Most growers continue to face supply issues. Availability will be affected by the holiday, and no price increases are expected. End users can be less affected by combining white and brown.

onions



Quality is good across all growing regions, with steady demand. Market prices on yellows and reds are steady, while whites are active and expected to continue increasing through the first of the year, possibly into February. The availability of whites is starting to get a little tight, with reds not too far behind. Mexico is buying a lot of whites and reds. Freight is beginning to increase.

onions green



Supply and demand are good coming from Mexico. Volumes are expected to decrease due to labor shortages and holidays. Markets are expected to react and increase in the coming weeks.



Market UPDATE

pears



RADAR The U.S. is expected to experience a significant downturn in the 2024/25 season, with production and exports reaching their lowest levels in decades. Pear production is predicted to drop 20%, the smallest harvest since the 1967/68 season. Damaged trees and blossoms from a January freeze and cold spring weather exacerbate the declining acreage trend. Oregon and California reported 15% and 17% declines, respectively, further tightening supplies.

peppers bell



Green Bell markets remain firm, with a gap on the east coast due to the impact of hurricanes earlier this year. Florida is awaiting new crop, which may take a couple more weeks to become available. West Coast supplies are better but still tight due to a slow transition into Mexican crops. Color Bell markets are struggling due to cooler weather and shorter days in central Mexico. As the crop continues to transition south, supplies are expected to improve.

peppers chili



Pricing is steady. Eastern production is limited, with poblanos especially short. The West, supplied by mostly central Mexico, offers moderate to good volumes, particularly of jalapeños and tomatillos. Habaneros, Anaheims, and poblanos are tight. Overall, quality is good, with availability varying.

pineapples



Availability remains consistent, with good supply across most sizes. Larger fruit faces limited availability, but smaller sizes are performing well and showing improved quality. Logistics remain steady, and no significant changes are expected.

potatoes



The Idaho market pricing is steady, with good quality. Yields are slightly down from last year. Despite the decrease, Idaho is expected to continue to have plentiful availability.

squash



Pricing is steady. Several Florida growing areas are starting to see good production in the east. The west is seeing good numbers crossing through Nogales.

tomatoes



Pricing is high. Florida's supplies for Roma, Round, and Grape varieties are still light, with volumes expected to improve after January 1st as new crops come online. Roma and round sizes are mostly on the smaller side, with improved sizing and volumes anticipated by mid-January. Mexico's supplies remain light, as the central Mexico and Baja season ends, but new crops in Sinaloa and Culiacan will boost supply in early January.



Market UPDATE

in the news...

10 produce trends for 2025

As a new year approaches, sustainability, convenience and health-conscious choices are set to shape the way consumers enjoy fruits and vegetables.

Jill Dutton • December 06, 2024 | thepacker.com

As consumers' tastes evolve and environmental concerns grow, the produce industry is preparing for another year of transformation in 2025. Industry insiders and data experts are already forecasting the trends that will shape shopping baskets, from increased interest in sustainability to social media's influence on consumers.

The Packer and Produce Market Guide spoke with data survey companies, grocers and produce suppliers, each identifying the trends they think will define the upcoming year. Together, their insights paint a picture of where produce is headed — and what it means for retailers, suppliers and shoppers alike.

1. Food as medicine

While the concept of food as medicine is far from new — the quote “Let food

be thy medicine and medicine be thy food,” is credited to Hippocrates — interest in the movement continues to gain traction as younger consumers increasingly turn to fruits and vegetables for health benefits. Curious Plot, a marketing, communications and consulting agency representing clients in the food and agriculture sectors weighed in on the topic.

Earlier this year, Curious Plot published its second annual “Consumer Curiosity Report,” an analysis of consumers nationwide most likely to set the next food trends. The study explores these more than 800 early food adopters' curiosities about culinary, nutrition and sustainability topics, all to help food marketers better prepare to take advantage of future trends.

Cristie Mather, vice president of food for Curious Plot, says produce



Produce trends for 2025 (Illustration: Adobe Stock and Tasha Fabela-Jonas)

marketers should take note of the essential role fruits and vegetables play in this trend.

“Our report uncovered that younger audiences are increasingly...

[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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