

Market OUTLOOK

Week 6: February 3-9, 2025



Powered by Foodbuy

Market ALERT

Asparagus
Brussels
Sprouts
Citrus
Grapes
Herbs
Melons
Pears
Pineapples
Squash

transportation

Nat'l Diesel Avg: \$3.659↑

Last Year: \$3.451↓

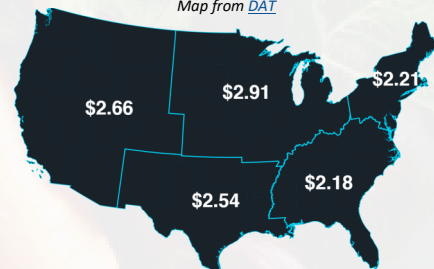
Nat'l Fuel Surcharge: \$0.44

Shortages: Freight rates is slightly elevated due to weather

- extreme - WA
- slight - AZ

National Posted Rate per mile

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



weather OUTLOOK

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

Salinas, CA: Cloudy and showers with highs in the 60s and lows in the 40s with rain on Tuesday.

Yuma, AZ: Partly cloudy and sunny skies with highs in the 80s and 70s and lows in the 50s.

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

Idaho Falls, ID: Rain, snow showers, and cloudy skies with highs in the 40s to 20s and lows in the 30s to mid-teens.



Powered by Foodbuy



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



RADAR Prices are slightly decreasing. Peruvian supplies are declining, with some fields closing, and cooler temperatures slowed Caborca harvesting. A market shift is expected in 2-3 weeks as Caborca reaches full production.

avocados



Mexico has experienced several successful picking days, with the pipeline filling up and preparing for the Super Bowl. Inventory has improved across sizes, and prices remain high, but the market has relaxed slightly, with crop best value under 60s and smaller.

bananas



The market continues to be steady, with strong supply and excellent quality.

beans



Green Beans: Prices are slightly lower with fair quality and steady volume and production, despite cooler weather in Florida, which may hinder growth.

Snow Peas: Prices are lower. Supplies from Guatemala are improving, but quality may be impacted due to the humidity.

berries



Blackberries: Prices are steady with good quality from Mexico and steady volume expected for the remainder of the year.

Blueberries: Prices are steady. Mexico's conventional are of good quality, although minor issues like shriveling exist. Production is expected to increase, with a peak in mid-March. Organics are done until August. Peru is done. Chileans are of good quality, but peak season has passed.

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

Strawberries: Prices are slightly up. Santa Maria's quality is good, with some fruit showing green shoulders. Volumes are increasing for Valentine's Day. The quality is good in Florida, but there are some green tips due to cooler weather and increasing production. Mexico reports good quality but some bruising and soft skin, with production peaking.

broccoli



Broccoli: Supplies are good, with some slowed demand. Prices are expected to remain steady, with supplies shipping from Yuma and Mexico.

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

brussels sprouts



The supply and quality have improved, and demand is strong. Market pricing has increased due to increased demand. Mexico supplies are now available, and markets are expected to remain steady for the next few weeks.



Market UPDATE

cabbages



The market is improving, with improved yields and quality from Oxnard and Yuma, and a steady supply is expected in the coming weeks.

carrots



Supply is stable, with strong quality and temporary sizing issues resolved. Demand is stable, and availability should meet expectations across retail and foodservice channels.

cauliflower



Supply is steady but expected to decrease next week due to increased demand. Mexico supplies are available, and quality is good. The market remains steady, but some growers are predicting increased pricing next week.

celery



Supplies have improved slightly from Santa Maria and Oxnard, with good quality. Market pricing is steady and expected to improve as demand decreases. Yuma just started, so that will help with supplies and pricing.

citrus



Limes: ALERT Pricing is trending up as the market rises due to lower yields. Recent extreme weather events across the U.S. have impacted demand. Production is shifting to a new crop of mainly small fruit. The market is expected to stay strong through February, with a decline in availability.

Lemons: Pricing is steady. Harvesting is in full swing across all three growing districts. Quality is good, and supplies are plentiful.

Oranges: Pricing is steady, but larger sizes

continue to be a challenge with little relief in sight. 88s, 113s, and 138s remain the peak sizes. Quality is good, and the fruit is eating well.

corn



Pricing is steady. Overall, supplies and quality are good. Recent cooler weather could affect supplies, leading to pricing instability.

cucumbers



Pricing remains steady. Florida supplies are done. Honduras is supplying the east. Meanwhile, the West has strong volume, helping to keep the markets stable.

grapes



RADAR The prices have slightly decreased. The market is shifting, with South American red seedless imports experiencing weak demand, while Peru, Brazil, and Chile are steady in green seedless, with Peru exporting Autumn Crisp, maintaining its quality and pricing.

herbs



Tarragon and **thyme** remain in short supply on the East Coast, but supply is slowly improving. On the West Coast, supplies are still low across the board because of cold weather in Mexico. Warm weather is in the forecast, which could improve supply levels by mid-February.

Cilantro: Supplies are steady, with only good quality. Demand has increased, and supplies are shipping out of Oxnard and Yuma. Supply is expected to be limited for the next few weeks with escalated market pricing.



Market UPDATE

kale



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

lettuce



Green & Red Leaf: The supply and quality are good along with size and weight, with decreased demand coming from Yuma. The supplies and markets are expected to remain steady for a few weeks. Yuma has experienced early morning frost for consecutive days; quality will be affected in the future.

Iceberg: The supply and quality are good, along with size and weight, with decreased demand coming from Yuma. Market pricing is expected to be steady in the coming weeks. Yuma has experienced early morning frost for consecutive days; quality will be affected in the future.

Romaine: The supply is good, with decreased demand causing the market to soften from Yuma. Quality is good along with size and weight. Market pricing is expected to remain steady. Yuma has experienced early morning frost for consecutive days; quality will be affected in the future.

Tender Leaf: Supply is steady with improved quality and good demand. Cooler mornings are causing a slower growth rate in Yuma.

melons



Cantaloupe: Prices are escalated. Limited supply due to shipping delays but is expected to be back to normal in Florida. New arrivals are mainly 9, 12, and some jumbos, with strong quality, good color, solid netting, and 10-12% brix.

Honeydew: Prices are escalated. Florida's supplies are slightly improving. Most of the fruit will be 5/5Js, with limited availability of 6/8.

Some flexibility may be necessary. Expect to see better availability of 6s and good brix levels of 11-13%. Assistance is being sought to help manage the demand.

mushrooms



Quality is good, and most growers have improved their supply challenges. 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 to increase, possibly into February. The availability of whites is getting 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 improving, with a steady market.

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.



Market UPDATE

peppers bell



Florida supply is at moderate to good levels, and Mexico is in full production on green bell, which has stabilized the market. The red bell market is starting to ease as crossings from Mexico improve. Pricing is stable.

peppers chili



Pricing is steady. Florida has light volumes due to cooler weather. West and central Mexico have good volumes and quality.

pineapples



Heavy rainfall in Costa Rica is causing market challenges, especially for larger fruit sizes due to prolonged cloud cover, reducing photosynthesis and slowing growth. Supplies are expected to be limited until July. Consistent supply cannot be guaranteed for larger fruit, so focus will shift towards covering demand for 8s with crowns and 8(10)s crowns. Expect supply disruptions, and

alternative sourcing or ordering preferences may be necessary.

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 trending up. Cold temperatures are slowing down production, leading to higher pricing and lighter supplies. Forecasted warmer weather should help with supplies.

tomatoes



Prices remain low due to full production in Florida and increased production in Mexico. Cold weather across the country is reducing demand, which helps keep prices low. While the weather may cause a slight dip in production, weak demand is expected to maintain stable pricing.



produce in **PEAK** for February

Beets	Kale	Limes
Broccoli	Kumquats	Oranges
Cabbage	Leeks	Turnips
Grapefruits	Lemons	



Market UPDATE

in the news...

Trump Moves Forward With Plans to Impose 25% Tariffs on Canada and Mexico Starting Saturday

Speaking from the Oval Office, Trump justified the tariffs as a response to what he described as excessive migration, drug trafficking and unfair trade practices. While he suggested the tariff rate could further increase, he indicated a decision on whether oil imports would be exempt would come soon.

Jim Wiesemeyer and Tyne Morgan • January 31, 2025 | thepacker.com

President Donald Trump announced that his administration will impose 25% tariffs on imports from Canada and Mexico starting Feb. 1, citing concerns over trade deficits, illegal immigration, and the fentanyl crisis.

Speaking from the Oval Office, Trump justified the tariffs as a response to what he described as excessive migration, drug trafficking, and unfair trade practices. While he suggested the tariff rate could rise further, he indicated that a decision on whether oil imports would be exempt would come soon.

"Mexico and Canada have never been good to us on trade. They've treated us very unfairly on trade," Trump said, pointing to the huge trade deficits between those countries and the United States. Trump also complained about fentanyl entering the country, especially from Mexico.

Trump also reiterated plans to impose tariffs on China over its alleged role in fentanyl trafficking and suggested additional sectoral tariffs on industries such as pharmaceuticals, semiconductor chips, and steel. The policy shift signals a potentially disruptive turn in North American trade relations, threatening key industries like automotive and energy.

Market Reacts

Market reactions were immediate, with oil prices rising above \$73 a barrel, the U.S. dollar strengthening, and the Canadian dollar and Mexican peso dropping. The move has triggered warnings of economic fallout, with both Canada and Mexico vowing to respond with retaliatory measures.

Five Key Questions to Ask

There are five key questions regarding tariff situation:

Will they be announced Sat., Feb. 1?

Will there be a last-minute agreement with Canada and/or Mexico?

What authority will be used to implement any tariffs?

Will there be any exemptions? Ongoing negotiations suggest a possible shift toward targeted measures, particularly affecting steel and aluminum, while oil may receive exemptions.

Will there be an implementation grace period to enable more negotiations?

Tariffs as a Tool to Pressure Canada and Mexico

The proposed tariffs are intended to pressure the two countries into negotiating on migration, drug smuggling, and reforms to the USMCA.



U.S. President Donald Trump signs executive orders in the Oval Office at the White House in Washington, U.S., January 30, 2025. (REUTERS/Elizabeth Frantz)

The strategy reflects Trump's preference for using tariffs as a tool to secure compliance with U.S. demands, as seen in a recent, albeit reversed, threat against Colombia.

While both Canada and Mexico have made overtures to address U.S. concerns, Trump's administration remains unsatisfied. Canadian officials have prepared a list of retaliatory measures and expressed frustration over unclear demands and limited communication. Mexico, meanwhile, has stepped up efforts to curb migration and...

[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!

Your Dedicated NPC Powered by Foodbuy Staff

