

Market **OUTLOOK**

Week 9: February 24 - March 2, 2025



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Market **ALERT**

Asparagus
Berries
Citrus
Herbs
Melons
Pears
Pineapples
Squash

transportation

Nat'l Diesel Avg: \$3.677↑

Last Year: \$4.109↓

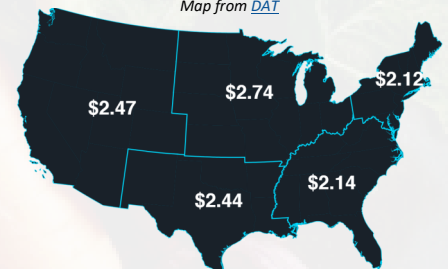
Nat'l Fuel Surcharge: \$0.44

Shortages: Rates are decreasing

- extreme - N/A
- slight - AZ & CA

National Posted Rate per mile

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



weather **OUTLOOK**

Oxnard, CA: Sunny and partly cloudy skies with highs in the 60s to 70s and lows in the 50s.

Salinas, CA: Partly cloudy with highs in the 60s to 70s and lows in the 40s.

Yuma, AZ: Partly cloudy and sunny skies with highs in the 80s to 90s and lows in the 50s to low 60s.

Immokalee, FL: Sunny skies with highs in the 70s and low 80s and lows in the 50s. Rain expected on Monday.

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 40s and lows in the 20s to low 30s. 22 mph winds on Tuesday.



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Market UPDATE

apples



Washington's 2024 crop is expected to be of outstanding quality due to favorable growing conditions. The forecasted crop is 124 million, down 136 million. However, 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 steady with an active market. Caborca and San Luis volumes continue to improve, and this trend is expected to last through the end of March. In contrast, Peruvian volume remains very low due to seasonality.

avocados



Last week's US total volumes dropped by 40% from projections of 56 million lbs. Mexico's limiting harvested volumes is playing out, with ample inventory at destination but problematic reload. Mexico growers can reject lower price points as the crop runs small, and they speculate higher returns could be had by allowing fruit to size up. Short-term new inventory crossing into the US comes at higher costs, and promotional planning for March needs to be approached cautiously due to ongoing instability. The average dry matter content of Mexican crops is 32.2%, and the recommended storage temperature is 39°F.

bananas



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

beans



Green Beans: Prices are steady with fair quality. Production is decreasing due to cooler weather in Florida.

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

berries



Blackberries: **RADAR** Prices are steady with good quality from Mexico and steady volume expected through the end of July.

Blueberries: Prices are steady. Good quality from Mexico, with minor issues, and production will peak in March. Due to high heat and rain, Chilean production is ending early, with harvest wrapping up next week. Oxnard is ramping up, with peak volume expected in late March.

Raspberries: **RADAR** Prices are up. Good quality, displaying a vibrant red color, good sizes, and firmness, with steady volumes from Mexico through the end of April.

Strawberries: **ALERT** Prices are steady. Fields in Santa Maria experienced significant weather-related losses, affecting fruit color, with damages ranging from 40% to 90%. Growers are focusing on cleanup this weekend, although some may delay until next week, potentially lowering estimates further. In Florida, fruit quality is good, with firmness, color, and flavor improvements due to warm weather. Meanwhile, Mexico's fruit quality is also good but has issues like bruising and soft skin, and production has passed its peak.

broccoli



Broccoli: Supplies are good, with some light demand. Prices are improving, with steady supplies shipping from Yuma and Mexico.



Market UPDATE

broccoli cont...



Broccolini: Supply and demand are light with fair quality. Limited supplies for the next few weeks along with increased market pricing from Yuma.

brussels sprouts



The supply and quality have improved, with good demand and decreased market pricing from Mexico.

cabbages



The market is improving, with improved yields and quality from Oxnard and Yuma and a steady supply.

carrots



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

cauliflower



The market is stable with good supply and light demand, with Mexico supplies being available and quality being fair.

celery



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

citrus



Limes: ALERT The market is stable with mid-range costs. Demand is steady but lower than

seasonal norms due to extreme weather across the country. Mexico has transitioned to new crops and is producing small fruit for the most part, but large fruit has been available at fair volumes. The market is expected to remain firm through February.

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. Recent rainfall has temporarily slowed harvesting. Fruit remains excellent. Starting to see better availability on larger fruit. 113s and 138s remain the peak sizes.

corn



Pricing is steady. Overall, supplies and quality are good.

cucumbers



Pricing remains steady. Honduras is supplying the East with good quality. West coast supplies remain strong out of Mexico.

grapes



The prices are lower. Heavy rains in southern Ica have damaged late-season crops, especially Autumn Crisp, which may lead to significant losses for Peruvian producers. Conversely, Chilean exports to the U.S. remain strong despite full cold storage and inconsistent quality. Currently, Red Seedless are priced slightly higher than Green Seedless, with Chilean varieties expected to improve by late March. The green seedless market faces oversupply and aggressive pricing, impacting the quality of high-priced Autumn Crisp.



Market UPDATE

herbs



Chives and **tarragon** continue to be in short supply on the East Coast due to field transitions. On the West Coast, herb supplies are still low across the board because of cold weather in Mexico; temperatures must warm up to see an improvement in supply.

Cilantro: Supplies are steady but limited, with only good quality and escalated market pricing. Demand has increased, and supplies are shipping out of Oxnard and Yuma.

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. Warmer weather should help with supplies.

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. Warmer weather should help with supplies.

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. Warmer weather should help with supplies.

Tender Leaf: Supply is steady with improved quality and good demand. Warmer weather should help with supplies.

melons



Cantaloupe: RADAR Prices are lower. Honduras is finishing its first cycle of production, while Guatemala's second cycle of production is ramping up. There will be a brief overlap, with Guatemala producing larger sizes. A market correction is expected as prices adjust for the spring volume period, with reduced overall volume anticipated. New production from Guatemala's Zacapa region shows excellent size, color, and brix levels.

Honeydew: RADAR Prices are lower. Supply from Honduras has increased and will likely remain elevated for about another week. The sizing is influenced by the country of origin, with Honduran fruit being larger (5/5Js) and Guatemalan fruit being smaller (6/8s). Overall quality is good, with brix levels between 11% and 13%.

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 are steady. The availability of whites is getting a little tight, with reds not too far behind.

onions green



Supply and demand are good coming from Mexico. Volumes are improving, with a steady market.



Market UPDATE

pears



RADAR The Northwest Bartlett crop is ending quickly, with only a few sizes and grades available for the next few weeks. The D'Anjou crop is down significantly in the Wenatchee Growing District, but not as severe in the Yakima Valley and Oregon Growing Districts, with the current movement, it will go through mid to the end of July. Bosc are down significantly in all growing regions, causing higher prices this season. Northwest Bosc is down 825k boxes, and Red Anjous have ample supply through June. All varietal pears, such as Forelle, Seckel, and Comice, are done for the season.

peppers bell



Pricing is stable. Good supplies and good quality are readily available out of both coasts.

peppers chili



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

pineapples



Costa Rica continues to experience significantly

reduced yields, especially in larger sizes, and quality issues like slowed growth continue to impact availability and sizes. Supplies are expected to be limited until July. Consistent supply cannot be guaranteed for larger fruit. 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 remains firm on yellow. Quality has been hit and miss from the tail end of older fields. Zucchini is strong out of both coasts, and pricing is steady. Look for yellow pricing to soften and quality to improve in the next week or two as new fields come online.

tomatoes



Pricing is low. Florida is at full production, and production in Mexico continues strong. Good quality is being reported across the board.

produce in **PEAK** for February

Beets	Leeks	Tangerines
Cabbage	Lemons	Turnips
Grapefruit	Oranges	Squash
Kale	Potatoes	



Market UPDATE

in the news...

Why the U.S. is 'on the brink of a fair-trade breakthrough'

The movement to empower growers is gaining momentum and connecting with consumers, advocates say.

TINA CAPUTO • February 20, 2025 | thepacker.com

Food prices increased 2.3% in 2024, and the USDA estimates that prices will creep up another 2.2% this year. Even so, rising grocery tallies don't seem to be deterring socially and eco-conscious consumers from paying a premium for fair trade produce.

"We're on the brink of a fair-trade breakthrough in the U.S.," said Rob Desson, senior business partnerships manager for fresh produce at Washington, D.C.-based Fairtrade America, the U.S. branch of Fairtrade International. "We see substantial growth potential over the course of the next five to 10 years."

While the U.S. has been slower to embrace the category than regions such as the United Kingdom and Canada, "the body of research showing Americans' increasing concern for sustainability and interest in purchasing more sustainable products is motivating the food and beverage sector to take action," Desson said.

The Packer spoke with fair trade produce advocates and purveyors to learn more about the state of the industry and organizations' plans to move the category forward in 2025.

The impacts of premium pricing

While fair trade produce appears to be gaining momentum, the potential for U.S. tariffs on imported produce could present pricing challenges this year.

"With fair trade product there is already an additional premium, with that money going back to the farmworker communities," said Joanna Jaramillo, marketing manager at Wholesum. With farms in the U.S. and Mexico, the Amado, Ariz.-based shipper and grower offers organic tomatoes, cucumbers, peppers, squash and eggplant certified through Fair Trade USA.

"With any additional pressure from tariffs, it does bring on those challenges of having customers and retailers opting into fair trade," she said.

To make it easier for new retailers to jump on board, Wholesum recently changed the structure of its premiums.

"The amount was lowered a little bit," Jaramillo said.

Though the decline in premiums led to some losses, volume sales have grown in recent years. The company is now working to get back on track in 2025.

"That means really pushing the program and highlighting those impact stories," she said. "Whenever we have a chance to sell an item as fair trade only, there's an opportunity to bring back those funds."

Kim Chackal, vice president of sales and marketing at Equifruit, a Montreal-based importer of Fairtrade International-certified bananas, points



A mural in Philadelphia depicts Maria Cobos, a Fairtrade-certified banana farmer from Ecuador. Her bananas are distributed by Equal Exchange. (Photo courtesy of Fairtrade America)

out that premium pricing can be a benefit to retailers rather than a deterrent.

"I had one retailer in particular tell me he was so tired after years of being told he has to make sure that he keeps his banana prices competitive with some of the larger players," she said. "So, he went ahead and raised his banana prices across the board by 20 cents a pound. He saw absolutely no negative effect whatsoever. The consumer didn't notice, nobody cared and suddenly his profitability went up."

She then pointed out to the retailer that he could sell even more...

[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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Market UPDATE

Transition Schedules - Spring 2025

Grower / Shipper	Current Location	Transitioning	Commodity	Transition Dates
Bengard Ranches	Yuma, AZ	Salinas, CA	Broccoli Crowns	03/17/25
Bengard Ranches	Yuma, AZ	Salinas, CA	Cauliflower	03/14/25
Bengard Ranches	Yuma, AZ	Huron, CA	Lettuce Iceberg	03/20/25
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/15/25
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/15/25
Bengard Ranches	Yuma, AZ	Oxnard, CA	Celery	03/17/25
Church Brothers	Yuma, AZ	Salinas, CA	Broccoli Crowns	03/31/25
Church Brothers	Yuma, AZ	Salinas, CA	Cauliflower	03/31/25
Church Brothers	Yuma, AZ	Huron, CA	Lettuce Iceberg	04/08/25
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/08/25
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/08/25
Church Brothers	Yuma, AZ	Oxnard, CA	Celery	04/08/25
Church Brothers	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	04/13/25
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Broccoli Crowns	03/31/25
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Iceberg	03/31/25
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Green Leaf / Red Leaf	03/31/25
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Romaine	03/31/25
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Value Added / Processing Plant	03/31/25
Green Gate Fresh	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	04/20/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Broccoli Crowns	04/14/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Cauliflower	04/14/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Iceberg	04/14/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/14/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/14/25
River Fresh Farms	Yuma, AZ	Oxnard, CA	Celery	04/14/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Value Added	04/14/25
Taylor Farms - CA	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	04/14/25
The Salad Farm	Yuma, AZ	Hollister, CA	Value Added / Processing Plant	03/31/25

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