

# Market OUTLOOK

Week 10: March 3-9, 2025



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Market ALERT

Beans  
Berries  
Herbs  
Melons  
Pears  
Pineapples

## transportation

Nat'l Diesel Avg: \$3.697↑

Last Year: \$4.058↓

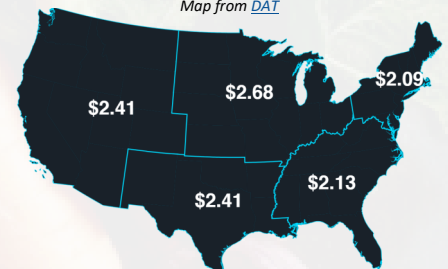
Nat'l Fuel Surcharge: \$0.44

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:** Partly cloudy and showers with highs in the 60s and lows in the 40s.

**Salinas, CA:** Cloudy skies and showers with highs in the 50s to 60s and lows in the 40s.

**Yuma, AZ:** Partly cloudy and sunny skies with highs in the 70s to 80s and lows in the upper 40s to 50s.

**Immokalee, FL:** Partly cloudy skies with highs in the 80s and lows in the 50s to 60s.

**Idaho Falls, ID:** Mostly cloudy skies with highs in the 40s and lows in the 20s to low 30s. Rain/snow on Monday.



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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 slightly lower this week. With the Peruvian season ending, Mexico is thriving, especially with larger sizes. The market is expected to stay competitive through February.

## avocados



Two weeks ago, the US market received around 46 million pounds of avocados. Due to restricted USDA inspector hours, Mexican packing houses can only work one shift per day, limiting export volumes. The revised crop update shows a 9.5% decrease in volume from the previous estimate, with about 39 million pounds available weekly. Mexico's size curve favors small sizes, with limited larger sizes. Offshore options, including Peru and Colombia, are expected to help fill supply gaps and provide pricing relief. California is benefiting from high USDA FOBs and harvesting when possible. Opening COO spec year-round is suggested for better value and consistent supply.

## bananas



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

## beans



**Green Beans:** **RADAR** Prices and supplies are steady. Supplies may face delays in vessel arrivals that could affect loading availability.

**Snow Peas:** **RADAR** Prices are slightly lower this week. Supplies from Guatemala are steady, but vessel delays may impact availability.

## berries



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

**Blueberries:** Prices are steady. Quality is excellent out of Mexico, with peak production lasting until mid-April. Due to adverse weather, Chilean production is ending early this week. Oxnard organic blueberries are ramping up, expecting peak volume in late March.

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

**Strawberries:** **ALERT** Prices are decreasing. Santa Maria are of good quality, and production expected to rise after weather stabilization. Florida is good quality with volumes steadying soon. While quality remains good in Mexico, issues like bruising and soft skin are present, and production has peaked.

## broccoli



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

**Broccolini:** Supplies and demand are light this week. Pricing from Yuma is expected to increase with limited supplies.





# Market UPDATE

## brussels sprouts



The supply and quality have improved, with good demand. Pricing has decreased. Mexico supplies are now available, and markets are expected to remain steady for the next few weeks.

## cabbages



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

## 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 good with demand slowing down. Mexico supplies are available, and quality is fair. The market remains steady and is expected to remain steady for the next few weeks.

## 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:** The market is stable with mid-range costs. Demand is steady but lower than seasonal norms due to extreme weather across the country. Mexico's new crop will mostly yield small fruit, with large sizes having 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. Rainfall has temporarily slowed harvesting, and small sizes may see price increase as volumes decrease. Quality remains excellent, with peak sizing on 88's.

## corn



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

## cucumbers



Pricing remains steady. Honduras programs are winding down. Spring Florida production will start soon, with production increasing through mid-March. Mexico continues to have strong volumes.

## grapes



The prices of offshore imports are table. Importers on both U.S. coasts are struggling with excess shipments and overcrowded cold storage. Exports from Peru and Chile have declined, worsened by heavy rains, leading growers to seek alternative markets for red seedless due to demand concerns. The green seedless market anticipates fluctuations around mid-April. Chile expects an increase in Autumn Crisp exports, offering more quality options for retailers.

## herbs



**Chives:** Supplies are improving on the East Coast. 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.





# Market UPDATE

## herbs continued



**Cilantro:** Supplies are steady, with 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.

## 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 for offshore imports are stable for this week. Quality is excellent with vibrant colors and optimal sizing. Internal brix levels range from 13% to 15%, enhancing their

flavor profile. Anticipated increased supplies will provide a good variety of sizes in the market.

**Honeydew:** **RADAR** Prices for offshore imports are stable for this week. Production from Honduras has been strong; however, a decline in new arrivals is expected next week, leading to a supply gap. Currently, sizing on the 5/6s is optimal for order fulfillment. Some fruit may show signs of aging due to storage. Increased availability is expected by Friday, with brix levels projected to be between 12% and 14%.

## 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



Supplies are on budget, with improved availability expected coming from Mexico. Demand continues to be good with a steady market.

## 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,





# Market UPDATE

## pears continued



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. South Florida has good supplies of jalapenos and habaneros, moderate volumes of poblanos, and limited serrano. New fields will start mid-March. Mexico's production is consistent, but serrano are tight and tomatillos have quality issues.

## pineapples



Heavy rainfall in Costa Rica has significantly reduced yields, especially in larger sizes, and

quality issues like waterlogging and slowed growth continue to impact availability. 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 is softening on yellow, as new fields have become available and supplies increase. Zucchini is strong out of both coasts, and pricing is steady.

## 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 March

Artichokes	Leeks	Pineapple
Asparagus	Limes	Radishes
Broccoli	Mandarins	Tangelos
Grapefruit	Parsnips	





# Market UPDATE

*in the news...*

## Mexico's Sheinbaum Pushes for USMCA Deal as Tariff Deadline Nears

*Trump said Monday that his planned 25% tariffs on all Mexican and Canadian exports to the U.S. "are going ahead on time, on schedule," meaning the duties would take effect on March 4 at the conclusion of a one-month suspension.*

Jim Wiesemeyer, Tyne Morgan • February 25, 2025 | [thepacker.com](https://thepacker.com)

Mexican President Claudia Sheinbaum reaffirmed her commitment to securing a deal with the U.S. to prevent the imposition of 25% tariffs on Mexican exports, set to take effect on March 4. She emphasized Mexico's dedication to addressing the U.S. fentanyl crisis and maintaining strong trade relations under the USMCA.

Sheinbaum also noted that Mexico is considering additional tariffs on imports from countries without free trade agreements, particularly China. Bloomberg reported this week that if Mexico imposes tariffs on Chinese imports the direct impact will be limited, as Mexico accounts for only 2.4% of China's total exports.

Economy Minister Marcelo Ebrard remains in Washington for negotiations, as Sheinbaum expressed willingness to speak directly with President Trump if necessary.

Trump said Monday that his planned 25% tariffs on all Mexican and Canadian exports to the U.S. "are going ahead on time, on schedule," meaning the duties would take effect on March 4 at the conclusion of a one-month suspension.

"This is an abuse that took place for many, many years," Trump said in justification of the decision to impose tariffs on the United States' neighbors

and North American trade partners. "And I'm not even blaming the other countries that did this, I blame our leadership for allowing it to happen. I mean who can blame them if they made these great deals with the United States, took advantage of the United States on manufacturing, on just about everything," he said at a joint press conference with French President Emmanuel Macron.

Are Tariff Threats Trump's Way to Reach a New USMCA Deal? As the Trump administration decides whether to impose tariffs or not, some argue this negotiation is a precursor to renegotiating USMCA, and this is actually President Trump's way of renegotiating that agreement.

Is that the case? That's what Farm Journal asked Gregg Doud who served as the Chief Agricultural Negotiator in the Office of the United States Trade Representative (USTR) during the Trump administration.

"I think you will intentionally never know the answer to that. That's what I think," said Doud. "You saw was it at CPAC last week where the Vice President, J.D. Vance, explained the art of President Trump and the way he negotiates. He never takes anything off the table.... it's all negotiable. That's the way he views the world. And he's



Claudia Sheinbaum Pardo, President of Mexico, speaking during a briefing conference at National Palace, on February 17, 2025 in Mexico City, Mexico. (Photo by Luis Barron/ EyePix Group)

never going to let you know really where you're at until the bottom line. He's a master at it, I think."

Parts of Mexico Face Growing Drought One factor that could impact demand for imports is Mexico's intensifying drought. Mexico's northwest region is grappling with extreme drought conditions, with parts of Sinaloa, Sonora, Chihuahua, Durango, and Coahuila classified under the highest drought severity level, "exceptional," according to the National Water Commission (Conagua).

The ongoing dry spell, exacerbated by the La Niña climate phenomenon...

[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](mailto: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	3/17/2025
Bengard Ranches	Yuma, AZ	Salinas, CA	Cauliflower	3/14/2025
Bengard Ranches	Yuma, AZ	Huron, CA	Lettuce Ice berg	3/20/2025
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	4/15/2025
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Romaine	4/15/2025
Bengard Ranches	Yuma, AZ	Oxnard, CA	Celery	3/17/2025
Church Brothers	Yuma, AZ	Salinas, CA	Broccoli Crowns	3/31/2025
Church Brothers	Yuma, AZ	Salinas, CA	Cauliflower	3/31/2025
Church Brothers	Yuma, AZ	Huron, CA	Lettuce Ice berg	4/8/2025
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	4/8/2025
Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Romaine	4/8/2025
Church Brothers	Yuma, AZ	Oxnard, CA	Celery	4/8/2025
Church Brothers	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	4/13/2025
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Broccoli Crowns	3/31/2025
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Ice berg	3/31/2025
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Green Leaf / Red Leaf	3/31/2025
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Romaine	3/31/2025
Field Fresh Farms	Yuma, AZ	Watsonville, CA	Value Added / Processing Plant	3/31/2025
Green Gate Fresh	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	4/20/2025
River Fresh Farms	Yuma, AZ	Salinas, CA	Broccoli Crowns	4/14/2025
River Fresh Farms	Yuma, AZ	Salinas, CA	Cauliflower	4/14/2025
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Ice berg	4/14/2025
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	4/14/2025
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Romaine	4/14/2025
River Fresh Farms	Yuma, AZ	Oxnard, CA	Celery	4/14/2025
River Fresh Farms	Yuma, AZ	Salinas, CA	Value Added	4/14/2025
Taylor Farms - CA	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	4/14/2025
The Salad Farm	Yuma, AZ	Hollister, CA	Value Added / Processing Plant	3/31/2025

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