

Market OUTLOOK

Week 14: March 31-April 6, 2025



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Market ALERT

Asparagus
Beans
Cilantro
Grapes
Limes
Pineapples
Strawberries
Tomatoes

transportation

Nat'l Diesel Avg: \$3.567↑

Last Year: \$4.034↓

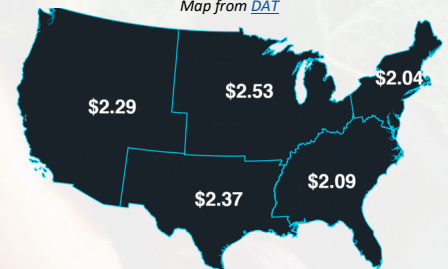
Nat'l Fuel Surcharge: \$0.42

Shortages: Rates are decreasing

- extreme - N/A
- slight - N/A

National Posted Rate per mile

previous week's average outbound reefer rate for each region
Map from DAT



weather OUTLOOK

Oxnard, CA: Partly cloudy skies and showers with highs in the 60s and upper 50s and lows in the 40s to 50s.

Salinas, CA: Partly cloudy skies and showers with highs in the 60s and upper 50s and lows in the 40s.

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

Immokalee, FL: Mostly sunny skies with highs in the 80s and 90s and lows in the 60s. Isolated thunderstorms on Monday.

Idaho Falls, ID: Cloudy skies and showers with highs in the 40s to 50s and lows in the 20s to 30s.



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Market UPDATE

apples



Washington's crop for Q2 will have good supplies and quality from CA storage. Honeycrisp apples are down 3.4 million boxes from last year but will remain strong until the new crop in late August. Granny Smith demand is strong. Foodservice promotable volumes in Q2 include red-skinned varieties like red, gala, fuji, and pink lady.

asparagus



RADAR Prices are rising slightly. Green asparagus supply will dip as Mexico transitions to Peru, causing price increases. The Caborca season lasts until mid-April, but limited supply may persist for 2-3 weeks. Peruvian arrivals are expected in about two weeks. Prices are rising, especially for XL/Jbo sizes. Michigan asparagus will be available in May and June, with good production expected. White asparagus is well available.

avocados



The industry is in a correction cycle with mismatched supply and demand. Strong volumes are projected next week, but tariff uncertainty may reduce inventory. California's harvest is strong, with increasing volumes into April. Colombia's mid-April arrivals will bring good volumes of smaller fruit. Peru's strong volumes provide market stability. Easter and Cinco will tighten inventories due to limited harvest days. Additional volumes from other countries may stabilize the market in May. Storage temperature: 38 degrees.

bananas



The market and pricing continue to be steady, with strong supply and quality.

beans



Green Beans: **RADAR** Prices are stable with steady supplies due to good weather in Florida.

Snow Peas: **RADAR** Prices are stable. Guatemala's growing season transitions from late March to early April, leading to potential supply challenges until mid-April. Peru starts production in May. Arrival delays affect immediate availability, with a variable supply.

berries



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

Blueberries: Prices are steady. Mexico's quality is excellent, with some redberry issues. Conventional production peaks until mid-April, while organic production has ended. Florida's season started well but is delayed due to weather. Oxnard's organics are peaking through April, with sizes of 14-16mm.

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

Strawberries: **RADAR** Prices are stable. Santa Maria is faring well despite recent rain, with effective management. Damage is 25-40%, but the fruit is mostly large to extra-large and of good quality. Production is expected to rise significantly as peak season nears. The Florida season ends this weekend, and the Mexico season has concluded.

broccoli



Broccoli: Supplies are light, with steady pricing and moderate demand from Yuma and Mexico. The transition to Salinas is expected to be complete in the next few weeks.



Market UPDATE

broccoli cont...



Broccolini: Supplies have improved, and demand is good with fair quality. Pricing from Yuma has returned to normal. The transition to Salinas will begin soon.

brussels sprouts



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

cabbages



The market, yields, and quality are improving from Oxnard and Yuma and a steady supply.

carrots



Supply is stable, with strong quality and temporary sizing issues resolved. Demand and pricing are stable.

cauliflower



Supply is light and demand is fair. Mexico supplies are available, and quality is fair. Pricing has improved, and growers will start to fully transition to Salinas in the next few weeks.

celery



Supplies continue to be good from Yuma and Oxnard, with good quality. Market pricing is steady and expected to improve as demand decreases.

citrus



Limes: ALERT Pricing is up. Overall yields are

declining, with small sizes peaking from new fields and large fruit scarce. The market is expected to be steady for most of April and soften towards the end of the month.

Lemons: Markets have strengthened slightly. Recent rains have delayed harvests, but with better weather, strong fruit growth is anticipated. Smaller sizes are becoming scarce, while larger sizes are still plentiful.

Oranges: Pricing is steady. Fruit quality is excellent, with peak sizing on 88s. Recent rains have supported growth, but smaller sizes may see price increases as volumes decrease. Strong juice prices help maintain overall price stability.

corn



Pricing is steady, and supplies and quality are good. Mexico is starting to wind down. Markets could see an uptick in pricing until California gets going in early April.

cucumbers



Pricing is steady. Florida's supply is increasing, with more fields online soon. Honduras imports end next week. Mexico's production is moderate, with improving quality and rising volumes expected.

grapes



RADAR The prices of offshore are stable. Chilean exporters are shifting to red seedless, expecting higher volumes and prices for Crimsons and Allisons. Peruvian supplies are declining, with the red market stabilizing but green seedless facing quality issues. Peruvian are preferred, and prices for premium varieties are being tested, with the best fruit likely to see rising prices. Chilean Autumn Crisp quality remains inferior to Peru's.



Market UPDATE

herbs



Cilantro: Supplies are on budget, with good quality. Demand is moderate, 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: Supplies remain strong, with good quality, sizing, and weights. Demand has increase, leading to higher market prices. Supplies are expected to be steady during the transition back to Salinas. Growers are currently shipping from Yuma.

Iceberg: Supplies are light with fair quality with increased demand has increased. Sizing and weights will be smaller out of Yuma. Pricing is expected to increase. Supplies are expected to increase with warmer weather and growers starting out of Huron.

Romaine: Supplies are light, with fair quality. Demand is increasing, leading to higher market prices. Weights and sizing are fair out of Yuma. Some visible cosmetic quality issues are expected.

Tender Leaf: Supply is steady with fair quality and increased demand. Some heat damage can be expected.

melons



Cantaloupe: Prices for offshore are stable for this week. Production is strong, focusing on large sizes, especially jumbo with 12/15s being limited.

Quality is exceptional, with high color, internal quality, and brix levels of 14-16%.

Honeydew: Prices for offshore are stable. Production is increasing and will remain steady through mid-April, with sizing primarily 5s and larger and a few 6s. Guatemalan fruits are clean externally and have tight seed cavities, featuring good flavor and brix levels of 13-15%.

mushrooms



Quality is good and supplies have improved. 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 are steady. The availability of whites is getting a little tight, with reds not too far behind. ID/OR will be winding down in April. Arizona, New Mexico, and Georgia are expected to start towards the end of April, and California in June.

onions green



Supplies are steady, and quality is good coming out of Mexico. Demand continues to be good with a steady market.

pears



The Pacific Northwest crop has strong demand and steady prices. Bosc is finishing up, leaving Anjou. Anjou is peaking on 80/90s. Green Anjou should be available through early August, bridging the gap until the new crop Bartlett starts in mid-August.



Market UPDATE

peppers bell



Pricing is trending slightly up on green bell due to lighter supplies on both coasts. The colored bells market remains steady with good volumes across the board.

peppers chili



Pricing is slightly up. South Florida has small volumes of chilies until mid-April. Mexico has moderate jalapeños and poblanos but tight supplies of other chilies. Quality is generally good, except for fair tomatillos.

pineapples



The market remains tight, but larger sizes are now more accessible due to improving weather conditions, while smaller sizes remain limited, affected by previous crop stress and harvest cycles. Price fluctuations continue as the market adjusts.

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 has firmed up on yellow squash. Florida's production is good on zucchini but lighter on yellow squash, with overall good quality. In Mexico, Sinaloa's production has decreased, but new plantings and Sonora starting soon will boost supply. Zucchini supplies are better than yellow squash in both regions.

tomatoes



Pricing is up. Florida's tomato production is low due to transitions and January's cool weather, but harvests are improving with warmer weather. Volume increases are expected by mid-April. Mexico's production will rise next week but remain lower overall.

produce in **PEAK** for April

Apricots	Kiwis	Papayas
Artichokes	Leeks	Pineapple
Asparagus	Mangoes	Radish
Guavas	Mushrooms	



Market UPDATE

in the news...

West Mexico growers navigate season of uncertainty

While contending with weather and the threat of tariffs, growers say the crop is shaping up well.

Christina Herrick • March 21, 2025 | thepacker.com

It's been a challenging season for growers in west Mexico, said Chris Ciruli, partner of PennRose Farms LLC.

"We had extreme heat early on in the season when we were planning, then [a] lack of water, followed by the uncertainty of the tariff situation, which has made for an interesting season, to say the least," Ciruli said.

Jorge Quintero Jr. agrees, noting it's nothing like he's seen during his time in the fresh produce industry.

"We can't compare it to any other season as far as what I've seen, and I've been in the business for about 30 years now," said Quintero, operations manager for Grower Alliance LLC, which grows chili peppers.

Growing season

Some growers in the states of Sinaloa and Sonora struggled with a lack of water early in the season, Quintero said, but that wasn't a lingering problem.

"There was some rain that fell, but [the lack of] water was an issue at the very beginning, and most people down there had access to well water," he said. "I don't think the water was even a real issue of bringing volumes or demand or anything down."

Jose Luis Obregon, president of IPR Fresh, said dry weather in the fall made water availability a challenge for some growers.

"The lack of rain in the fall has left reservoirs at very low levels," he said. "Additionally, the consistently great weather has led to an oversupply, as there have been no natural disruptions to slow production."

Currently, there's been some unseasonably cool weather in the growing regions in west Mexico, which Ciruli said could dampen the season. PennRose ships cucumbers, eggplant, zucchini and yellow squash, hard squash varieties and some green beans from west Mexico.

Quintero said the cold weather slightly impacted Grower Alliance's Sonora production because the season started early, but crops should be back by the second week of March.

"During the hard freeze or cold weather, that's when they slow down, but we're coming back into the Sonora period this week," he said.

"The west Mexico season generally ends by the end of May, and our hope is that weather will be favorable, without extremes, so that we can close the deal on a positive note before we transition into Baja and other growing



Chris Ciruli, partner of PennRose Farms LLC, says weather-related price fluctuations this growing season has been a challenge for west Mexico growers. (Photo courtesy of PennRose Farms LLC)

areas," Ciruli said.

Alán Aguirre Camou, chief marketing officer for Divine Flavor, said crops in Sinaloa are in full force through May, with Sonora bridging a gap until production picks up in central and Baja California Sur.

"April and May will be key months for our melon programs, and then of course, our grape programs from Mexico will be in full force from April through July," he said.

Aguirre Camou said Jalisco grape season looks good and will begin in...

[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	03/22/25
Bengard Ranches	Yuma, AZ	Salinas, CA	Cauliflower	03/25/25
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Iceberg	04/15/25
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/15/25
Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/05/25
Bengard Ranches	Yuma, AZ	Salinas, CA	Celery	06/15/25
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	03/23/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Cauliflower	03/23/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Iceberg	04/16/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	04/04/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Romaine	04/04/25
River Fresh Farms	Yuma, AZ	Salinas, CA	Celery	06/15/25
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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