

Market OUTLOOK

Week 18: April 28-May 4, 2025



Powered by Foodbuy

Market ALERT

Asparagus
Beans
Berries
Brussels
Chili Peppers
Grapes
Herbs
Limes
Melons
Pineapples

transportation

Nat'l Diesel Avg: \$3.534↓

Last Year: \$3.992↓

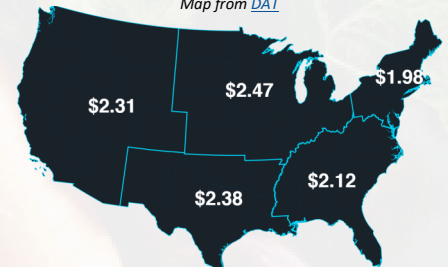
Nat'l Fuel Surcharge: \$0.42

Shortages: Rates are flat

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

National Posted Rate per mile

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



weather OUTLOOK

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

Salinas, CA: Partly cloudy with highs in the 60s and lows in the 40s to lower 50s.

Yuma, AZ: Sunny skies with highs in the 80s to 90s and lows in the 60s.

Immokalee, FL: Mostly sunny skies with highs in the 80s to 90s and lows in the 60s. Thunderstorms Monday, Saturday, and Sunday.

Idaho Falls, ID: Partly cloudy skies with highs in the 60s to 70s and lows in the 30s to 40s. Showers on Monday morning.



Powered by Foodbuy



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 skin varieties like red, gala, fuji, and pink lady.

asparagus



Prices are escalated. Mexican supplies are light as the season ends, boosting market demand. Larger sizes are especially limited. Quality is good overall, with a full transition to Peruvian supplies expected by early May. Michigan's season should start by mid-May.

avocados



Coming out of Holy Week with a 3-day harvest gap from Mexico, the market remains stable. The volume leading into Holy Week provided enough supply to cover Cinco Ads. There are some size concerns due to mismatched demand and supply, but overall availability is suitable. Next week, Mexico will observe Labor Day on Thursday, 5/1, with no harvest. However, California is operating at full capacity, and Peru's volumes are expected to double, keeping the market steady. Our focus is now on backfilling after Cinco pulls. Field pricing in Mexico remains high due to strong demand for fruit to maintain inventory. Storage temperature recommendations: MX 38°F, CA 42°F.

bananas



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

beans



Green Beans: **RADAR** Prices are stable. Supplies of green beans remain steady with good production in Florida, transitioning to Georgia in the next week or two. French bean availability has improved for loading by the end of the week, but production has decreased due to a lack of rain in Guatemala, and vessel delays are affecting shelf life.

Snow Peas: **RADAR** Prices are stable for this week. Availability has improved, but production from Guatemala remains unchanged. The quality may be affected by humidity in the growing region.

berries



Blackberries: Prices are stable. Good quality from Mexico, though volume is dipping due to recent pruning.

Blueberries: **RADAR** Prices are stable. Quality is excellent with production decreasing as the season ends. Florida is entering peak season with good quality, and Oxnard's organic blueberries are at peak production but will drop through April and May.

Raspberries: Prices are stable. Quality is strong and volumes should be consistent through April from Mexico.

Strawberries: **RADAR** Prices are stable. Fruit from Santa Maria are large, firm, and shiny, increasing production due to favorable weather. Watsonville and Salinas are just starting their season with small pickings.



Market UPDATE

broccoli



Broccoli: Supplies are steady this week, with steady pricing and moderate demand. Supplies are shipping from Salinas and Mexico. Markets should be steady over the next few weeks.

Broccolini: Supplies and demand are good. Quality and pricing has improved. Growers are now shipping from Salinas.

brussels sprouts



Supplies are light, with fair quality. Demand is good and current supplies are from Mexico. Markets will increase in the coming weeks but expect limited supplies.

cabbages



Supplies are steady. The market, yields, and quality are improving from central CA.

carrots



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

cauliflower



Supplies are light and demand is moderate. Mexico supplies are available, and quality is fair. Pricing has improved, and growers are now shipping from Salinas.

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. The market is escalating due to rising costs and increased demand for Cinco de Mayo. Colombia and Peru have fair availability in South Jersey and South Florida to help meet the demand.

Lemons: Market is steady. The crop is trending towards larger sizes, while supplies of smaller fruit continue to tighten.

Oranges: Fruit quality is excellent, with outstanding taste. Markets for smaller fruit are firming up, and prices are trending upward.

corn



Market is steady. Demand will pick up as we get close to Cinco de Mayo.

cucumbers



Market is steady. South Florida has a steady supply for the next 2-3 weeks. Plant City starts soon, followed by Georgia in early May. Mexico's volumes are moderate with good quality, especially from Baja.

grapes



The prices of offshore imports are trending higher. The market is experiencing tight supplies due to the end of Chilean and Peruvian harvests and delays in the Mexican harvest. Premium green seedless grapes are in high demand, while red seedless grapes are more available but have quality issues from recent rainfall in Chile. The Mexican harvest of green varieties will start soon, followed by red seedless varieties a week later. Most of Mexico's premium fruit will be sold domestically, limiting U.S. exports and leading to tight supplies and high demand for quality seedless varieties until production increases.



Market UPDATE

herbs



Cilantro: In the east, basil and mint quality is struggling due to rain in Colombia, with supply adequate but quality only fair. In the west, logistical issues have caused a short-term basil shortage, but the disruption should be minimal. Cilantro supplies are steady, with good quality and moderate demand.

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 risen this week, leading to higher market prices. Growers will be shipping from Salinas, with steady supplies expected.

Iceberg: Supplies are good this week with improved quality and increased demand. Sizing and weights are expected to improve. Growers are shipping from Salinas, CA. Markets and supplies should remain good in the coming weeks.

Romaine: Supplies are steady this week, with good quality. Demand is increasing, and weights and sizing are improving. Most growers are now shipping from Salinas.

Tender Leaf: Supply is steady with fair quality and increased demand. Growers now shipping from Salinas.

melons



Cantaloupe: **RADAR** Prices for offshore imports are stable for this week. Availability is limited due to high demand, shipping delays, and seasonal

production declines. This week's arrivals are mostly jumbo-sized fruit, with smaller sizes scarce. Florida production will continue until mid-May before transitioning to Yuma.

Honeydew: **RADAR** Prices for offshore imports are stable for this week. Offshore production has significantly decreased over the past two weeks, reducing supply further due to vessel delays. The focus is on larger sizes requiring a 6J pack for proper coverage. Supply is expected to stabilize by the end of next week for about ten days before a seasonal decline.

mushrooms



Supplies, quality, and yields are reported as good, and prices are expected to remain steady.

onions



Quality is good across all growing regions, with steady demand. Market prices are slightly up on yellows, while red and white are steady. 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. Quality issues are expected with rising temperatures in Mexico.

pears



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



Market UPDATE

peppers bell



Pricing is steady, but supply is tight. Florida's older fields yield smaller sizes, while newer fields offer better quality. Overall supply remains light through April. Plant City starts in two weeks, followed by Georgia. Mexico's season ends with inconsistent quality. Domestic bell pepper production in the West begins in early to mid-May, starting with Coachella. Canada is producing strong-quality colored bells.

peppers chili



Pricing is up. South Florida is winding down, with decent jalapeño volumes but limited poblanos and serranos. Plant City will start in 7-10 days, improving quality and volume. Mexico's production is lighter than usual, with jalapeños most available and other chili varieties in smaller volumes. Tomatillos face quality challenges.

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



The market is steady. Volumes will increase soon as new fields are harvested. Georgia will begin harvesting in 7-10 days. Quality has been good, with occasional light scarring. Sonora is supplying the West through late May, before shifting to California and other domestic programs.

tomatoes



The market is down. Florida's roma production is steady with quality fruit from Estero and light volumes from Ruskin/Palmetto. Mexico's production is transitioning, with declines in Culiacán and slow ramp-ups in Hermosillo, Obregón, and Baja. Central Mexico's output is light but expected to increase in May. Florida's round tomato production is strong, with smaller sizing. Mexico's round tomato volume is lower, with new acreage expected soon. Grape volumes are steady in Florida and Mexico, with new crops anticipated in Baja and Central Mexico.



produce in **PEAK** for May

Apricots	Mangoes	Strawberry
Asparagus	Okra	Spinach
Broccoli	Peas	Zucchini
Kiwi	Radishes	



Market UPDATE

in the news...

Fresh fiesta: Make Cinco de Mayo essentials star in holiday promotions

Retailers can leverage peak demand for avocados, limes, tomatoes and peppers with creative promotions, festive displays and cross-merchandising strategies.

Jill Dutton • March 31, 2025 | thepacker.com

Cinco de Mayo provides a prime sales opportunity for fresh produce as the holiday celebrating Mexican heritage and culture sparks a surge in demand for items such as avocados, limes, tomatoes and hot peppers as consumers plan festive gatherings.

Retailers can maximize sales through eye-catching displays, themed promotions and cross-merchandising strategies.

Peak produce items

A Cinco de Mayo celebration wouldn't feel complete without avocados taking the lead. Avocados From Mexico suggests multiple recipes for consumers to get creative with avocados, not only as guacamole but also as a layered fiesta taco dip, in deviled eggs, as a skewer with mozzarella and tomatoes or even a dessert of lime meringue with avocado

mascarpone cream.

"Avocados play a big role in the lead up to Cinco de Mayo," says Stephanie Bazan, senior vice president of commercial strategy and execution for Avocados From Mexico. "Per Numerator, the week during Cinco, fresh avocados are ranked No. 3 in total units after bananas and citrus fruits. When comparing the percent lift from the week prior to Cinco to the week of Cinco, fresh avocados are the top growing in absolute units and experience the highest percent change week over week."

Meeting the increased demand is imperative, and this year looks to have an outstanding season. Naturipe Farms says this year's avocado season is shaping up to be one of the best yet, with a strong supply driven by the growing impact of maturing avocado trees in Colombia.



Retailers can use creative displays of Cinco de Mayo essentials to entice shoppers planning for festivities. Cross-merchandising and themed promotions also can help drive related sales.

With Mexico providing year-round supply and Colombia complementing the seasonal transitions, hass avocados from both these points of origin result in a harmonious blend, according to...

[Read full article HERE](#)



Click the picture above to learn how to fight against global food waste

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



Powered by Foodbuy