

Market OUTLOOK

Week 21: May 19-25, 2025



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Market ALERT

Asparagus
Beans
Berries
Brussels
Citrus
Grapes
Melons
Tomatoes

transportation

Nat'l Diesel Avg: \$3.476↓

Last Year: \$3.848↓

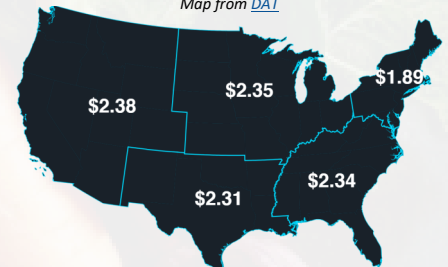
Nat'l Fuel Surcharge: \$0.43

Shortages: Rates are flat

- extreme - FL
- slight - AZ

National Posted Rate per mile

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



weather OUTLOOK

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

Salinas, CA: Mostly sunny skies with highs in the 60s to 70s and lows in the lower 50s.

Yuma, AZ: Sunny skies with highs in the 90s to 100s, and lows in the 60s and 70s.

Immokalee, FL: Partly cloudy and sunny skies with highs in the 90s and lows in the 70s.

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



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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



Prices are stable. Mexican asparagus supplies remain light as the season winds down, with strong demand and limited availability of larger sizes. Quality is good overall. A full transition to Peruvian supply is expected by early May, with Michigan's season likely to begin by mid-May.

avocados



US volumes remain stable into June, while Mexico's market share drops, down 16% from 2024, as Peru and other origins see strong growth. This trend is expected to continue, making 2025 a notably different season. Mexico transitions to Loca fruit in July, with cautious optimism for market stability. Recommended storage temperatures are 38°F for Mexico and 42°F for California, Colombia, and Peru.

bananas



Supply is tightening slightly due to shipping delays and crop pacing, with regional availability fluctuations expected. Quality remains solid, but pricing may rise with demand and freight shifts.

beans



Green Beans: **RADAR** Prices are stable. Georgia has begun its season as Florida's remaining fields are set to close by the end of the week. No major

availability issues reported, and volumes are expected to remain steady.

Snow Peas: **RADAR** Prices are steady. Availability has improved, but production from Guatemala remains unchanged. Quality may be affected by humidity in the growing region.

berries



Blackberries: Prices are lower. Good quality from Mexico, though recent pruning has led to a slight dip in production, with volume remaining steady.

Blueberries: **ALERT** Prices are trending higher. Mexican volumes are declining and will end by July, with organic resuming in August. Florida is past peak with reduced volumes. Oxnard's organic crop is ending, while Georgia's remains strong but weather-impacted. In California's Central Valley, organic volumes are doubling weekly, with a peak in two weeks; conventional is peaking mid-May. Pacific Northwest production starts around July.

Raspberries: Prices are stable. Quality is strong from Mexico, and volume is currently low but expected to increase steadily through May.

Strawberries: Prices are stable. In Santa Maria, production has reached its spring peak, with strong quality holding despite a gradual decrease in size. Meanwhile, in Watsonville and Salinas, both conventional and organic production are ramping up, with excellent quality reported and peak volumes expected by June.

broccoli



Broccoli: Supplies and pricing are steady, with moderate demand. Supplies are shipping from Salinas and Mexico. The markets are expected to be steady for the next few weeks.



Market UPDATE

broccoli cont...



Broccolini: Supplies, quality, and demand are good. Pricing should remain steady in the next few weeks from Salinas.

brussels sprouts



Supplies remain tight, with fair quality and strong demand. Mexico's volumes are down, causing the market to increase and expected to be elevated for the next few weeks.

cabbages



Supplies are steady with improved quality, market pricing, and yield from central California.

carrots



Supply and quality are strong, with firm pricing and steady demand. Good availability across all packaging styles.

cauliflower



Supplies remain strong with moderate demand. Availability and quality have improved, with some product from Mexico. Markets are steady, and shipments are now coming out of Salinas.

celery



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

citrus



Limes: ALERT Pricing is up. Mexico is producing smaller sizes (175s and smaller), while larger sizes have been extremely scarce due to lack of rain.

Lemons: ALERT Prices continue to rise as District 1 wraps up and transitions to District 2. Larger fruit sizes (115s, 95s, 75s) are plentiful, while smaller sizes (140s) remain limited. Winds in District 2 have reduced fancy-grade fruit, likely driving prices higher. Larger sizes remain the best for promotion.

Oranges: Market remains steady. Fruit quality is excellent, with strong demand for smaller sizes.

corn



The market remains steady. Western supply has been good, and Florida remains steady. Memorial Day pulls are set to start which could tighten up the market for the upcoming weeks.

cucumbers



The market remains steady. Eastern production has shifted to Georgia with strong volume and quality, as Florida winds down. North Carolina and other regions will soon add supply. In the West, Mexico and Baja continue with moderate volumes, with top quality from newer crops.

grapes



Import prices are higher as the market shifts from South America to Mexico. Late-season Chilean Crimsons maintain good quality, while early Mexican Flames begin mid-May and build through month's end. California's red grape harvest starts in July, overlapping with Mexico. Green seedless from South America is winding down with mixed quality as Mexican Early Sweets enter the market.

herbs



Quality and supply in the East have improved. Chervil remains limited until mid-June. The West Coast continues to see good supply and quality.



Market UPDATE

herbs cont...



Cilantro: Supplies remain steady with good quality and moderate demand. Increased availability in Oxnard and Salinas is expected to support market improvements.

kale



Supplies and pricing remain steady with good demand and quality coming from Salinas.

lettuce



Green & Red Leaf: Supplies and quality are good, along with sizing, and weights. Demand has increased, leading to higher market prices. Steady supplies from Salinas.

Iceberg: Supplies and quality are good with increased demand. Size and weights have improved from Salinas. Markets and supplies expected to be good in the next few weeks.

Romaine: Supplies and quality are good with increased demand. Size and weights have improved from Salinas. Markets and supplies are expected to be good in the next few weeks.

Tender Leaf: Supplies are good with increased demand and fair quality. Steady supplies from Salinas. Market and supplies are expected to be good in the next few weeks.

melons



Cantaloupe: **RADAR** Prices are higher. Florida arrivals continue through late May, bridging the gap to Yuma, starting mid-May with lighter volumes and smaller sizes. Larger fruit will be limited early but should increase by early June. Offshore supplies are shifting to larger sizes, and quality has improved with a return to drier growing regions in Guatemala.

Honeydew: **RADAR** Prices are higher. Honeydew supplies are volatile as offshore production ends and Mexican volumes dip, especially in premium sizes. Recent fruit has shown rain and scarring impacts, but a regional shift in Mexico should improve supply. Yuma production is expected to begin late May.

mushrooms



The quality and yields are excellent, and there are no anticipated price increases.

onions



Quality remains strong across all growing regions, with steady demand. California, Arizona, and Georgia have started, while New Mexico faces a slight delay. Texas supplies are limited due to weather impacts.

onions green



Supplies are steady with good demand. Markets are expected to remain steady out of Mexico. However, increased temperatures in Mexico may cause quality cosmetic issues.

pears



The Pacific Northwest crop has strong demand and steady prices. Bosc is finishing up, leaving Anjou and Red 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



The market remains steady. Colored bell supply is strong from Eastern and Western Canada, despite minor weather-related slowdowns. Central Mexico's volumes are light with mixed quality. Green bell supply is limited in the East, but Georgia's season is starting, with volume expected to increase. In the West, Mexico is winding down with smaller, off-grade fruit, while California has begun harvesting high-quality, larger-sized green bells. Overall quality is fair to good, with improvements expected soon.

peppers chili



Pricing remains steady. Eastern chili production is focused in Plant City, FL, with light to moderate volumes and good quality. Georgia will begin harvesting in 10–14 days, increasing supply. In the West, Mexico continues with moderate volumes and good quality, except for fair-quality tomatillos. California has begun light harvesting.

pineapples



Supply is stabilizing heading into August, with larger sizes more available and smaller sizes improving weekly. Quality is trending up, though supply may still vary with harvest cycles. Pricing is easing but remains elevated. Flexibility on sizing is recommended, along with early planning for late-summer demand.

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 remains steady. Eastern squash supply is strong, with full production and good quality from Plant City and Georgia. Additional regional programs will boost supply soon. In the West, Sonora reports moderate zucchini and light yellow squash volumes, with Baja starting and California's Central Coast ramping up.

tomatoes



Prices are up as Roma production in the East winds down early due to heat and drought. Mexico will take over in June, with Baja and Central regions ramping up and improving in quality. Round have shifted to Ruskin/Palmetto, showing good quality but smaller sizing, with production slowing by late May. South Carolina and Florida will start in early June with light supplies. Mexico's Culiacan region is finishing as Baja increases volumes. Florida's grape supply remains strong but will taper by late May, while South Carolina begins and Mexico's volumes improve with new crops.



Market UPDATE

in the news...

Climate crisis threatens the banana, the world's most popular fruit, research shows

Fourth most important food crop in peril as Latin America and Caribbean suffer from slow-onset climate disaster

Nina Lakhani • May 12, 2025 | [theguardian.com](https://www.theguardian.com)

The climate crisis is threatening the future of the world's most popular fruit, as almost two-thirds of banana-growing areas in Latin America and the Caribbean may no longer be suitable for growing the fruit by 2080, new research has found.

Rising temperatures, extreme weather and climate-related pests are pummeling banana-growing countries such as Guatemala, Costa Rica and Colombia, reducing yields and devastating rural communities across the region, according to Christian Aid's new report, *Going Bananas: How Climate Change Threatens the World's Favourite Fruit*.

Bananas are the world's most consumed fruit – and the fourth most important food crop globally, after wheat, rice and maize. About 80% of

bananas grown globally are for local consumption, and more than 400 million people rely on the fruit for 15% to 27% of their daily calories.

An estimated 80% of banana exports which supply supermarkets around the world come from Latin America and the Caribbean – one of the most vulnerable regions to extreme weather and slow-onset climate disasters.

And yet the crop is under threat from the human-made climate crisis, and threatens a vital food source and the livelihoods of communities that have contributed virtually nothing to the greenhouse gases driving global heating.

"Climate change has been killing our crops. This means there is no income because we cannot sell anything. What is happening is that my plantation has



More than 400 million people rely on the banana for 15% to 27% of their daily calories. Photograph: Christian Ender/Getty Images

been dying. So, what has been happening is death," Aurelia Pop Xo, 53, a banana grower in Guatemala, told Christian Aid researchers. Bananas...

[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