

Market OUTLOOK

Week 22: May 26– June 1, 2025



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Market ALERT

Asparagus
Beans
Berries
Broccolini
Brussels
Citrus
Grapes
Melons
Tomatoes

transportation

Nat'l Diesel Avg: \$3.536↑

Last Year: \$3.789↓

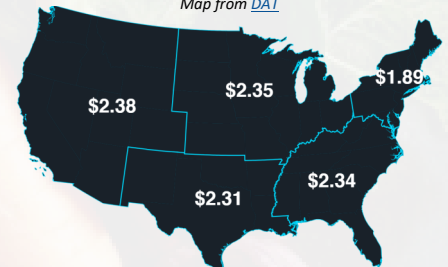
Nat'l Fuel Surcharge: \$0.42

Shortages: Rates are flat

- extreme - N/A
- slight - 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 70s and upper 60s and lows in the 50s.

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

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

Immokalee, FL: Evening thunderstorms with highs in the 90s and lows in the 70s.

Idaho Falls, ID: Mostly sunny skies with highs in the 70s to 80s and lows in the lower 50s.



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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. Baja production remains low due to weather, while Peru is increasing volume, though some fields are closing. Domestic supply is sufficient, with most U.S. regions harvesting or starting within 2–3 weeks. Michigan production is strong but may slow with cooler nights. Markets are less active amid higher availability. White asparagus is not expected until late July.

avocados



Peruvian volumes are set to double in the next two weeks, keeping prices soft. As sourcing shifts from Mexico to Peru, market dynamics will change. Mexico's Loca crop will favor smaller fruit, while Peru offers strong volumes of 48ct and larger. Colombia mainly supplies 60ct and smaller, and California shows a typical size curve, peaking at 48s. Unlike past years, no delays are expected in the Loca transition. The industry is cautiously optimistic about stable summer supply. Recommended storage: 38°F for Mexico, 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. Green bean availability is strong, driven by increased Georgia production and improved trimmed supply. Markets are beginning to soften. French bean supply is also solid, with steady output from Mexico and Guatemala, though shipping delays from Guatemala continue.

Snow Peas: **RADAR** Prices are steady. Snow pea supplies remain extremely limited due to weather and humidity issues in Guatemala, with no relief expected until Peru begins harvesting in early July. In contrast, sugar snap pea volumes from Mexico are strong and stable, with good quality and promotional opportunities. Some Guatemalan product may show minor quality issues.

berries



Blackberries: Prices are lower this week. Mexican volumes are stable, with a slight dip from recent pruning. Quality remains strong, and volumes are expected to rebound soon.

Blueberries: **ALERT** Prices are trending lower. Mexico continues to ship top-quality fruit, though production will drop 50% as the season winds down. Florida is ramping up quickly, with peak volumes and strong quality expected. Oxnard, CA is at peak for organic blueberries, but volume will decline through April and May.

Raspberries: Prices are trending lower. Mexico remains at peak production with strong quality, which is expected to continue through April.

Strawberries: Prices are stable. Santa Maria is producing large, high-quality fruit, though rain and cooler temps may slow ripening. Light harvesting has begun in Watsonville/Salinas for both conventional and organic.



Market UPDATE

broccoli



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

Broccolini: **ALERT** Supplies are light, with good quality and demand. Pricing has escalated and yields are lower this week.

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 yields from central California.

carrots



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

cauliflower



Supplies are steady with moderate demand. Growers are reporting improved availability and quality out of Salinas and Mexico.

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 are steadily rising. District 1 is done, full focus shifts to District 2. Winds have reduced fancy-grade fruit in District 2, causing expected price increases. Larger sizes remain most promotable.

Oranges: Market is steady. As the Navel season winds down, smaller fruit continues to remain limited. Valencia crop is anticipated to start in June.

corn



Market remains steady. Supply out of the west has been good and Florida remains steady. Memorial Day 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. 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



The prices of offshore imports are stable. Chilean shipments are winding down with some late-season quality concerns. Mexico is ramping up—Jalisco is shipping early Flames, and Sonora will begin green seedless soon. Quality is strong, and volume will build through June to meet summer demand.



Market UPDATE

herbs



Quality and supplies out of the east have improved. Basil quality is still affected by rain. Chervil is expected to be in short supply until mid-June. Western supply and quality are strong.

Cilantro: Supplies have improved with good quality and moderate demand out of Oxnard and Salinas. Market pricing and supplies are expected to improve in the next few weeks.

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, quality, and demand are good. Size and weights have improved from Salinas. Markets and supplies are expected to be steady 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 stable. Offshore supplies from Guatemala continue through late May, showing strong quality, high brix, and favorable sizing (mostly 9s and 12s) thanks to dry

conditions in Zacapa. Domestic harvests have begun in Yuma, AZ with excellent quality and current sizing at 9/12s. Warmer temps may boost fruit size, with jumbos expected next week.

Honeydew: **RADAR** Prices are stable. Offshore quality has been mixed due to earlier rain in western Guatemala, but improved arrivals are expected as harvest shifts to drier Zacapa. Availability remains tight, especially for larger sizes, after a gap in Mexican production. Smaller sizes are more available, though flexibility and potential delays may be needed. Yuma's domestic desert production is expected to begin soon, helping ease large fruit supply constraints.

mushrooms



Supplies, quality, and yields are good, 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.

onions green



Supplies are steady with good demand. Improved availability, and markets are expected to remain steady in the coming weeks 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 has started harvesting, increasing supply. In the West, Mexico continues with moderate volumes and good quality. 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 is winding down, with Baja starting and California's Central Coast harvesting light volume.

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...

California farmer's vision for farm train to transform America's rail and food network

Elaine Culotti's 559 Rail initiative is reimagining America's food supply chain by uniting farming and railroads to reduce waste, empower growers of all sizes and bring fresh, affordable food directly to underserved communities.

Jill Dutton • May 22, 2025 | thepacker.com

"The two greatest things in America are farming and railroad," says Elaine Culotti.

The sustainable farmer, entrepreneur and "Undercover Billionaire" alum is on a mission to transform America's crumbling rail infrastructure into a lifeline for the country's farmers and food-insecure communities. Through her new initiative, 559 Rail, Culotti seeks to bring new life to abandoned rail depots, reimagining them as local food hubs that connect farmers directly to consumers while dramatically reducing supply chain waste.

The U.S. EPA estimates that 30% to 40% of the 2023 food supply was lost as waste, and Culotti believes the solution lies not in high-tech warehouses or centralized systems but

in reactivating the infrastructure that once built the nation.

At the heart of the 559 farm train is a scalable, decentralized distribution model that moves fresh produce from both large and small farms more quickly, sustainably and equitably — cutting out middlemen, lowering costs and delivering nutrition where it's needed most, Culotti says.

The birth of 559 Rail

Known as the "Lipstick Farmer," Culotti owns BigZ Ranch, a 40-acre working farm in Fallbrook, Calif., growing everything from palm trees to produce. She partners with local growers to deliver farm-fresh food directly to customers, with no middlemen and no grocery markups, she says.

Now, with 559 Rail, she's scaling that



(Photo: streetflash, Adobe Stock)

model across the country by repurposing rail depots into local food hubs, creating permanent farmers markets and empowering farmers to...

[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