Market OUTLOOK

Week 25: June 16-22, 2025

npc
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Market ALERT

Asparagus

Beans

Citrus

Grapes

Herbs

Melons

transportation

Nat'l Diesel Avg: $3.471↑

Last Year: $3.658↓

Nat'l Fuel Surcharge: $0.40

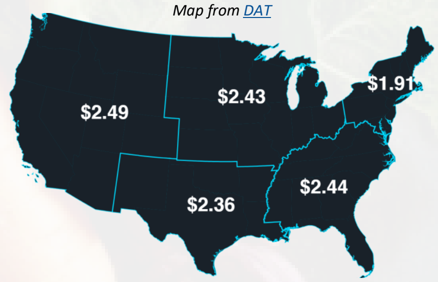
Shortages: Rates are flat

- **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: Sunny skies with highs in the lower 70s and lows in the 50s and 60s.

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

Yuma, AZ: Sunny skies with highs in the 100s to 110s and lows in the upper 70s.

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

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

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 slightly higher. The market is stable with good quality and steady supply. Cooler weather briefly slowed Mexican production, but conditions are improving. Peruvian supply to resume soon. Washington and Michigan remain strong; recent rains had minimal impact.

avocados

Market remains mostly unchanged. Larger sizes from Mexico are increasing, while smaller sizes decline. Peru has overtaken California in volume, with both continuing strong contributions. Jalisco's next crop starts in two weeks; Michoacán's Flora Loca begins in July. Monitor the Loca transition. For storage, recommended temperatures are 38°F for Mexico and 42°F for both California and Colombia.

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. Monitor volumes closely and coordinate with ripening partners to manage potential shortages.

beans

Green Beans: RADAR Prices are stable. Production has shifted to Georgia with steady volumes.

Snow Peas: RADAR Prices are stable with steady imports from Guatemala, Mexico, and Peru. Quality is good, though humidity poses some risk. Strong demand and tight supply may drive prices higher.

berries

Blackberries: Mexican supply remains solid despite some heat-related issues, and California regions are beginning to increase production.

Blueberries: The transition is moving from Mexico to California, now in peak season with excellent quality. Oregon starts mid-June, followed by Washington and British Columbia in July.

Raspberries: Supply remains steady from Mexico with good quality, while Watsonville is expected to ramp up later in June.

Strawberries: Production is peaking in Santa Maria and Watsonville, with strong quality and increasing volumes.

broccoli

Broccoli: Supplies remain light. Shipping from Salinas, with some availability from Mexico. Quality is excellent with good color. Demand is up, and markets are firm and expected to rise.

Broccolini: Supply is steady and improving with excellent quality. Shipments are coming from Salinas. Demand is strong, markets are stabilizing, and yields are expected to remain steady.

brussels sprouts

Supply has improved with steady volume from Mexico. Quality is good. A strong opportunity for promotion. Markets and supply are expected to remain stable.

cabbages

Supply and quality are good with improved yields from Central California. Market pricing is stable, and supplies are expected to remain consistent.

carrots

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

cauliflower

Supply is steady but expected to decrease. Quality is good. Shipments are coming from Salinas. Demand is strong, markets are firm, and likely to rise with reduced supply.

celery

Supplies remain strong from Oxnard, Santa Maria, and Salinas with good quality. Market pricing is steady but expected to improve as demand softens. Availability should remain stable in the coming weeks.

citrus

Limes: ALERT The U.S. market has stalled with weakening demand for small and medium-sized fruit. Prices are falling but may have bottomed out for smaller sizes. Mexico's drought has limited large-size supply, though upcoming rain could improve conditions.

Lemons: ALERT Prices are steadily increasing. With District 1 finished, full focus has shifted to District 2. Larger sizes remain the most promotable.

Oranges: The market is steady. Navel season has ended, and Valencia harvesting is underway, showing a clean crop with mostly smaller sizes. Larger fruit is expected to become more available as the season progresses.

corn

The market is steady with strong Western supply. Florida is winding down with heat affecting quality. Georgia will start soon, followed by North Carolina.

cucumbers

The market is steady. Supply remains stable in both the East and West, with good quality reported from Georgia, North Carolina, and Baja. Overlapping production regions are helping maintain consistent availability.

grapes

Offshore import prices remain stable as the market shifts from South America to Mexico. California red grapes start in early July. The South American green seedless supply is winding down with mixed quality, while Mexican Early Sweets show steady growth.

herbs

Dill: ALERT Supply is limited in the east due to rain in Colombia, while supply and quality remain strong in the west.

Chervil: ALERT Supply is expected to be limited until mid-June in the east, while supply and quality remain strong in the west.

Cilantro: Supplies are steady with good quality and moderate demand. Shipping from Oxnard and Salinas, with market pricing and availability expected to remain steady in the coming weeks.

kale

Supplies remain steady with strong demand and good quality. Shipping from Salinas, with stable market pricing expected in the coming weeks.

lettuce

Green & Red Leaf: Supply is strong with steady shipments from Salinas. Quality, sizing, and weights are good. Demand is rising, and markets are expected to be elevated with stable supply ahead.

Iceberg: Supply is steady with good quality and very good weights shipping from Salinas. Demand is stable, and markets are expected to remain steady.

Romaine: **ALERT** Supply is light due to planting gaps, with fair quality. Shipments are coming from Salinas. Markets are expected to increase as light supply continues.

Tender Leaf: Supplies remain strong with good demand and quality. Shipping from Salinas, with steady markets and availability expected in the coming weeks.

melons

Cantaloupe: **RADAR** Production has eased slightly in Yuma, allowing the market to stabilize and potentially strengthen. Limited availability of 12s may require size flexibility. Quality is very good, with strong shell color and Brix levels ranging from 14–17%.

Honeydew: **RADAR** Domestic supply is steady with sizing between 5s and 6s. Flexibility on size has helped meet demand. Quality is consistent with some external scarring, and flavor is excellent with Brix levels ranging from 13–15%.

mushrooms

Supply and quality are steady with strong demand. Market pricing is expected to remain stable through June. White mushrooms lead in foodservice, with growing interest in specialty and organic varieties.

onions

Quality remains strong across all regions with steady demand. Available in Arizona, California, Georgia, and New Mexico, while Texas supplies are limited due to weather impacts.

onions green

Supply and availability are strong from Mexico with good quality. Expect a steady supply and stable market pricing in the coming weeks.

pears

Strong demand and steady prices continue from the Pacific Northwest. Bosc is finishing, leaving Anjou and Red Anjou, with Anjou peaking on 80/90s. Green Anjou should be available through early August, bridging the gap until Bartlett starts mid-August.

peppers bell

The market is steady, with strong supply in both Eastern and Western regions. Georgia is in full production with good quality and volume, while Eastern North Carolina is expected to begin harvesting in late June. In the West, California's desert region continues steady output, soon transitioning to Bakersfield.

peppers chili

The market is steady. Eastern production is focused in Georgia as Florida winds down. Western volume is shifting to Baja and California with good overall quality.

pineapples

Supply is stabilizing toward August, with larger sizes more available and smaller sizes improving weekly. Quality is trending up, though variations may occur with harvest cycles. Pricing is easing but remains elevated. Sizing flexibility and early planning for late-summer demand are recommended.

potatoes

Idaho market pricing remains steady with good quality. Yields are slightly down from last year, but plentiful availability is expected to continue.

squash

The market is steady. Eastern supply is shifting from Georgia to North Carolina and New Jersey. Western regions remain active with stable zucchini quality and a fair yellow squash market. Availability is stable, with quality expected to improve as more regional programs come online.

tomatoes

The market is steady. Roma are limited in the East, with light volumes from South Georgia and North Florida after Central Florida's season ended. Buyers are shifting west, where Mexico is transitioning to new crops and California will begin harvesting soon. Round are also moving north, with early South Carolina crops looking promising. Western supplies are stable. Grape are moderate and steady, with good quality from new Eastern regions and fresh harvests starting in Mexico and Baja.

in the news...

Annual inflation rises 2.4%, but fresh produce down 0.5%

Fresh fruit and vegetable prices dropped 0.5 percent in May 2025 from May 2024 but rose from April to May 2025 by 0.5 percent.

June 11, 2025 | Bluebookservices.com

The Consumer Price Index for All Urban Consumers (CPI-U) increased 0.1 percent on a seasonally adjusted basis in May, after rising 0.2 percent in April, the U.S. Bureau of Labor Statistics reported today. Over the last 12 months, the all items index increased 2.4 percent before seasonal adjustment.

The index for shelter rose 0.3 percent in May and was the primary factor in the all items monthly increase. The food index increased 0.3 percent as both of its major components, the index for food at home and the index for food away from home also rose 0.3 percent in May. In contrast, the energy index declined 1.0 percent in May as the gasoline index fell over the month.

The index for all items less food and energy rose 0.1 percent in May, following a 0.2-percent increase in April. Indexes that increased over the month include medical care, motor vehicle insurance, household furnishings and operations, personal care, and education. The indexes for airline fares, used cars and trucks, new vehicles, and apparel were among the major indexes that decreased in May.

The all items index rose 2.4 percent for the 12 months ending May, after rising 2.3 percent over the 12 months ending April. The all items less food and energy index rose 2.8 percent over the last 12 months. The energy index decreased 3.5 percent for the 12 months ending May. The food index increased 2.9 percent over the last year.

Food

The index for food increased 0.3 percent in May, after falling 0.1 percent in April. The food at home index also rose 0.3 percent over the month. Three of the six major grocery store food group indexes increased in May, while the other three declined. The index for other food at home rose 0.7 percent in May, after falling 0.1 percent in April. The cereals and bakery products index rose 1.1 percent over

The U.S. Bureau of Labor Statistics released its monthly Consumer Price Index Summary June, 11, 2025:

the month and the fruits and vegetables index rose 0.3 percent.

In contrast, the index for meats, poultry, fish, and eggs fell 0.4 percent in May as the index for eggs decreased 2.7 percent. The nonalcoholic beverages index declined 0.3 percent over the month and the...

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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