

Market OUTLOOK

Week 24: June 9-15, 2025



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Market ALERT

Asparagus
Beans
Berries
Broccolini
Citrus
Grapes
Herbs
Melons

transportation

Nat'l Diesel Avg: \$3.451↓

Last Year: \$3.726↓

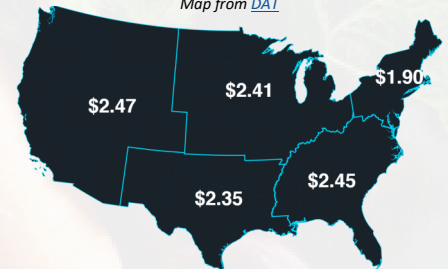
Nat'l Fuel Surcharge: \$0.40

Shortages: Rates are flat

- extreme - N/A
- slight - AZ

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 with highs in the upper 60s and lows in the upper 50s.

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

Yuma, AZ: Sunny skies with highs in the 100s and lows in the 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 80s to low 90s and lows in the 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



RADAR Prices are slightly higher. The market remains stable with good quality and steady supply. Mexican production is recovering from cooler weather, and Peruvian supply will resume soon. Washington and Michigan remain strong, with minimal impact from recent rains.

avocados



Mexico's market share is declining as California and Peru reach peak volumes in June and July. U.S. imports are projected to exceed 70 million lbs. over six weeks, a sharp increase from last year. Jalisco's next crop begins in two weeks, with Michoacán's Flor Loca crop on track for July. California's harvest slowed due to softer pricing and the holiday, allowing fruit to size up. Colombia's Travesía season remains strong, with 130 million lbs. projected for spring-summer. Size curves favor smaller fruit. Storage temperatures: Mexico at 38°F, California/Colombia at 42°F. 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. Green bean production shifts from Florida to Georgia with a strong start. Recent rains had minimal impact; volumes remain steady. French beans face availability issues due to port delays, though quality is generally good.

Snow Peas: **RADAR** Prices are stable this week. Supply remains steady with consistent imports from Guatemala, Mexico, and Peru. Quality is good, though recent humidity raises concerns. Growers are monitoring closely as strong demand and tight supply push prices up.

berries



Blackberries: Prices are lower this week. Quality remains good in Mexico, though production has slightly dipped due to recent pruning. Overall volume remains steady.

Blueberries: **RADAR** Prices are trending lower. Mexican volumes taper, ending by July. Florida is past peak due to earlier weather. Oxnard organic supplies declining; Georgia solid but weather-affected. Pacific Northwest starts in July.

Raspberries: Prices are trending lower. Good quality out of Mexico. Volumes are currently dipping but are forecast to increase steadily through May.

Strawberries: Prices are stable. Santa Maria hits spring peak with strong quality; berry size declining. Watsonville/Salinas is ramping up with excellent quality, and peak volumes in June.



Market UPDATE

broccoli



Broccoli: Supplies are light, with demand and market pricing increasing. Shipping from Salinas, with some availability from Mexico. Expect continued light supplies with an active market for the next few weeks.

Broccolini: **ALERT** Supplies have improved with strong demand, good quality, and stabilizing market pricing. Yields are better, and availability is on budget from Salinas.

brussels sprouts



Supplies and quality have improved with strong demand. Availability from Mexico has increased, and market pricing is strengthening.

cabbages



Supplies and yields have improved, with better quality and steady market pricing. Availability from central California is expected to remain stable in the coming weeks.

carrots



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

cauliflower



Supplies have improved with increased demand and good quality. The market is improving, with availability from Salinas and some from Mexico.

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 rising as focus shifts to District 2. Winds have reduced fancy-grade fruit, driving expected price increases. Larger sizes remain the most promotable.

Oranges: The market is steady as Valencia harvesting begins and navels end, with clean crop of mostly smaller sizes. Larger fruit expected to increase as the season progresses.

corn



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

cucumbers



The market is steady with stable supply on both coasts. Georgia is in full production, with North Carolina starting soon. Quality is good overall, despite minor cosmetic flaws. Western supply remains strong, with top-quality product from Baja and Central Mexico.

grapes



Offshore prices remain stable as the market shifts from South America to Mexico. California red start in early July.



Market UPDATE

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 have improved with good quality and moderate demand. Shipping from Oxnard and Salinas, with market pricing and availability expected to strengthen 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: Supplies remain strong with increasing demand, good quality, and favorable sizing. Market pricing is steady, and availability should remain stable from Salinas.

Iceberg: Supplies are strong with improved quality, increased demand, and good sizing. Markets are steady, and availability should remain stable from Salinas.

Romaine: Supplies are light with good quality and increased demand. Markets are rising due to limited availability, with favorable weights and sizing. Pricing is expected to escalate due to supply gaps. Shipping from Salinas.

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

melons



Cantaloupe: **RADAR** Sizing is peaking at 9/9Js, with 12s typical for the spring Yuma season. Triple-digit temperatures are expected, likely sustaining larger fruit. Early quality is excellent, with bright shell color and strong shelf life. Brix levels remain high at 14-16%.

Honeydew: **RADAR** Production is increasing, with sizing favoring mid-range 6/8s over 5s. External quality is clean, and internal brix levels are mostly in the 13-15% range.

mushrooms



Supplies, quality, and yields of white and brown are good, and there are no anticipated price increases.

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



Supplies are strong with steady demand and improved availability from Mexico. Markets are expected to remain stable 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.



Market UPDATE

peppers bell



The market remains steady with strong supply in both East and West. Georgia continues with good quality and volume despite minor cosmetic issues. Eastern North Carolina begins harvest around June 20, while California's desert region maintains steady production, soon shifting to Bakersfield.

peppers chili



The market remains steady. Eastern supply is shifting to Georgia with improved quality and moderate volume. Western regions remain active, with top quality from Baja and California.

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 remains steady with strong supply. Quality is good despite minor weather-related issues. North Carolina is starting up, while Sonora winds down and Santa Maria maintains steady volumes.

tomatoes



The market remains steady. Roma supply is tight in the East with good quality, while Mexico and Baja remain stable. California will start soon. Grape tomatoes are steady in Florida as South Carolina begins, with Western regions shifting to Baja and Central Mexico. Round tomato production is ending in Florida, with new harvests in Quincy and South Carolina. Western supply is strong, with Baja expanding and California expected by mid-June.





Market UPDATE

in the news...

USDA Links Catastrophic Honeybee Losses to High Viral Loads, Mite Resistance

Research points to alarmingly high levels of viral infections — vectored by Varroa mites with resistant genes to a common treatment — as key drivers of colony collapse.

JENNIFER STRAILEY | June 05, 2025 | [THE PACKER](#)

What caused catastrophic honeybee colony losses earlier this year? Researchers, scientists and beekeepers have been looking for answers since January, and now new research from the USDA's Agricultural Research Service has identified causes behind the devastating losses.

The findings point to alarmingly high levels of viral infections — vectored by Varroa mites with resistant genes to a common treatment — as key drivers of colony collapse, according to a news release from the Honey Bee Health Coalition, a project of the Keystone Policy Center.

"I think we always thought that it would be some kind of viral load that was transmitted from the Varroa mite," Matt Mulica, senior project director with the Keystone Policy Center, told The Packer. "As a reminder, the Varroa mite is ubiquitous across the country. On a human scale, it'd be about the size of a dinner plate, like a mite or tick. So, it's very large compared to the size of a bee's body."

The study analyzed samples from six major commercial beekeeping operations affected by the losses, which collectively managed nearly 184,000 colonies — roughly 7% of all U.S. hives — and reported losses averaging over 60%, just as bees were

being staged for California's almond pollination season, according to the Honey Bee Health Coalition.

Mulica said the biggest reveal from the research was that it determined the mortality-causing viruses were Deformed Wing Virus (DWV-A and DWV-B) and Acute Bee Paralysis Virus.

All Varroa mites collected from affected colonies tested positive for a genetic marker linked to resistance to amitraz, the most commonly used miticide in commercial beekeeping, said the Honey Bee Health Coalition, adding that this finding underscores the "urgent need for new tools and integrated pest management strategies."

Any pest is going to build resistance as beekeepers or farmers try to control it by more frequent treatments and higher doses, and that was the case here, said Mulica.

He pointed to a number of tools that beekeepers use to fight against Varroa, including coumaphos and tau-fluvalinate, which were used in the '90s and to which eventually mites built resistance to as well.

"It's all about rotation of chemicals and cultural techniques," said Mulica. "Beekeepers shouldn't be relying on



USDA findings reveal high viral loads and mite resistance as leading causes of honeybee colony losses earlier this year. (Photo: Cavan for Adobe, Adobe Stock)

amitraz as their primary mite control method. There's a whole host of other chemicals, but also cultural techniques that they can use — re-queening and drone brood breaks (the removal of male bees from a honeybee hive to interrupt the Varroa mite life cycle and reduce mite populations), along with formic acid and oxalic acid, and some of these other new and emerging treatments."

A Threat to U.S. Food Security

Late last month the Environmental Protection Agency, which has called Varroa mites "a national....

[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

