

# Market OUTLOOK

Week 30: July 21-27, 2025



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Market ALERT

Beans  
Broccoli  
Brussels Sprouts  
Herbs  
Lemons  
Lettuces  
Peppers Bell  
Peppers Chili  
Pineapples  
Squash  
Tomatoes

## transportation

Nat'l Diesel Avg: \$3.758↑

Last Year: \$3.69↓

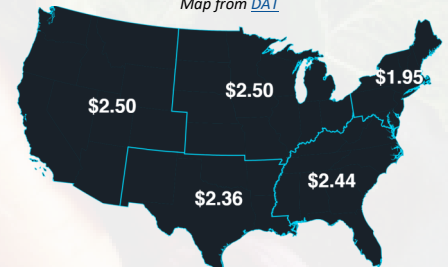
Nat'l Fuel Surcharge: \$0.46

Shortages: Rates are flat

- extreme - N/A
- slight - FL, GA, and SC

### National Posted Rate per mile

previous week's average outbound reefer rate for each region  
Map from DAT



## weather OUTLOOK

**Oxnard, CA:** Mostly sunny and partly cloudy throughout the week with highs in the upper 60s and lows in the 60s.

**Salinas, CA:** Partly cloudy and sunny skies with highs in the mid-60s and lows in the 50s.

**Yuma, AZ:** Partly cloudy and sunny skies with highs in the 100s and lows in the 80s.

**Immokalee, FL:** Thunderstorms all week with highs in the 90s and lows in the 70s.

**Idaho Falls, ID:** Partly cloudy and sunny skies with highs in the 90s and lows in the 50s.



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# Market UPDATE

## apples



Washington's Q3 crop volumes are expected to remain active but slightly below last year. Harvest is in full swing, led by Gala, Honeycrisp, and Fuji. June price increases for Cosmic Crisp and Honeycrisp suggest strong momentum heading into summer.

## asparagus



Peru continues to show limited availability of extra-large and jumbo sizes, with more volume in small and standard due to the winter season. Mexico reports strong supply and demand with good quality, though larger sizes remain tight. As Peru's volume tapers and more Mexican product shifts to Canada and the West Coast, slight market adjustments are anticipated.

## avocados



Mexico continues to lead U.S. supply, followed by Peru and California. Flora Loca is trending larger, with clean appearance, firmer skin, and minimal grade 2 pack out. Pricing between grades is narrowing as Negra volumes decline. Flora Loca stores best at 40–42°F, while Negra performs better at 38°F. Peru is at peak production, and California remains steady. Larger sizes are increasingly available across all regions.

## bananas



Supply remains steady with slight tightening in select regions. Quality is consistent, and logistics continue to perform well. Minor price shifts may occur depending on origin and freight dynamics.

## beans



**Green Beans:** **ALERT** Supplies remain tight as U.S. and Mexican growers recover from a difficult

season marked by flooding, heatwaves, and severe storms. Weather disruptions across key regions—including the Midwest, Southeast, Texas, and northern Mexico—have impacted yields and logistics. Prorates are in effect, with elevated pricing and limited availability expected through July.

**Snow Peas:** Peru's supply is strong with fair quality, while Guatemala faces limited availability and fair quality due to recent heavy rains.

## berries



**Blackberries:** Supply is declining as weather challenges in Mexico, particularly heat and rain, impact yields and quality. Watsonville continues to produce strong, consistent fruit.

**Blueberries:** Supply remains steady, with good volume from the Pacific Northwest.

**Raspberries:** Supply is declining as weather challenges in Mexico—particularly heat and rain—impact yields and quality. Watsonville continues to produce strong, consistent fruit.

**Strawberries:** Market is steady. Volumes are past peak and gradually declining, with smaller sizing expected ahead.

## broccoli



**Broccoli:** **ALERT** Supplies remain light. Mexico is facing quality challenges due to excess rain, while most shipments are coming from Salinas and Santa Maria, where quality is reported as fair. Demand has softened, markets are steady, and pricing is expected to hold firm.

**Broccolini:** Supplies are good with excellent quality. Most shipments are now coming from the Salinas Valley. Demand has slightly decreased, but yields remain favorable, and markets are expected to stay stable.





# Market UPDATE

## brussels sprouts



**EXTREME** Supplies remain very limited, with current volume coming from Mexico. Quality is fair at best. Availability is expected to stay tight, with market pricing continuing to rise until the full transition to Central California is complete.

## cabbages



Supplies are strong with improved yields and quality from Central California. Market pricing is steady and expected to remain consistent.

## carrots



Supplies remain stable with strong quality and consistent sizing across growing regions. Demand is steady, pricing is flat, and no major disruptions are expected.

## cauliflower



Supplies have improved, with fair quality marked by some yellowing and light insect pressure. Most shipments are coming from Salinas and Santa Maria. Demand has softened, and market pricing has declined. Continued improvement in supply and stable markets is expected.

## celery



Supplies remain strong with good quality. Most shipments are coming from Salinas and Santa Maria. Steady supply is expected to continue, with market pricing showing signs of strengthening.

## citrus



**Limes:** Market is stable. Increased rainfall in Mexico has improved the availability of medium and large sizes. Prices are balanced, supporting

July promotions. Some quality issues—such as oil spots and styler-end rot—may occur in transit due to heat and humidity during growth.

**Lemons:** **ALERT** Market is steady. Harvest is in full swing in District 2, with strong volumes expected through July to support supply into September. High winds have reduced the Fancy grade percentage. The crop is peaking on 140s and 115s, while smaller sizes remain limited through October. Flexibility toward larger sizes is advised to maintain consistent supply and avoid delays.

**Oranges:** The market is steady. The Valencia crop is in full swing, showing a clean harvest with mostly smaller sizes. Larger fruit is expected to increase as the season progresses.

## corn



The market is firm. Eastern supply is steady but transitioning, with Georgia finished and North Carolina, Virginia, New Jersey, and Delaware ramping up. On the West Coast, California leads with strong yields and quality. Markets are expected to stabilize soon.

## cucumbers



The market remains steady. Eastern supply is light, with demand outpacing availability. Michigan and New York are expected to boost volume soon. In the West, Baja continues to deliver strong quality.

## grapes



The market is shifting to California, with improving quality as Mexican supply declines. Expect firmer pricing and short-term tightness until California volumes increase. Variety and flexibility is advised.





# Market UPDATE

## herbs



**Cilantro:** Supplies are lighter, with good quality reported. Demand has increased, and shipments are now coming from Oxnard and Salinas. Market pricing and supply levels are expected to remain steady in the coming weeks.

**Tarragon:** **ALERT** Supply remains fair but inconsistent, with ongoing heat and rain.

## kale



Supplies are steady, with strong demand and good quality reported. Shipments are coming from Salinas, and both supply levels and market pricing are expected to remain stable in the coming weeks.

## lettuce



**Green & Red Leaf:** Supplies have improved, with most shipments now coming from Salinas. Demand has softened, leading to lower market pricing. Quality is currently fair due to light insect pressure. Lighter supplies and elevated pricing are expected going forward.

**Iceberg:** **ALERT** Supplies are showing signs of improvement, with most shipments now coming from Salinas and Santa Maria. Quality is fair due to light insect pressure, with lighter carton weights and occasional smaller heads. Yields are improving, but supplies are expected to remain light with elevated market pricing.

**Romaine:** **ALERT** Supplies have improved, with most shipments now coming from Salinas and Santa Maria. Quality is fair due to light insect pressure, and lighter carton weights are expected. Markets are steady, with improved supplies anticipated.

**Tender Leaf:** Supplies and demand remain strong, with good quality reported. Shipments

from Salinas have stabilized availability. Markets and supplies are expected to remain steady in the coming weeks.

## melons



**Cantaloupe:** Harvest has transitioned to the Dos Palos, known for producing premium melon quality due to its extended growing cycle. Volume is increasing, with improved consistency and strong quality. Sizing is shifting toward regular 9ct, while 12s remain limited; 12Js will be used as needed. Fruit shows excellent color, flavor, and firmness, with Brix levels mostly between 13–15%, peaking above 18%.

**Honeydew:** Production is dominated by jumbo sizes, with regular 5s packed as 6Js to meet demand. External quality is generally clean with occasional scarring, while internal quality remains excellent, featuring Brix levels of 14–16% and strong flavor.

## mushrooms



Supplies are expected to remain steady, with good demand and quality reported. Market pricing is stable through July. White mushrooms continue to lead in foodservice popularity, while demand for specialty and organic varieties is increasing.

## onions



Quality remains strong across all active growing regions, with steady demand. Supplies are currently available from Arizona, California, Georgia, and New Mexico, while Texas continues to face limited availability due to weather-related challenges. New Mexico is expected to wrap up by the end of July, with production transitioning to Idaho/Oregon.





# Market UPDATE

## onions green



Supplies are steady, with limited volume coming from Mexico. Quality is fair, impacted by excess heat causing lower yields and quality issues. Expect continued limited availability and elevated market pricing in the coming weeks.

## pears



Washington's Q3 volumes are expected to remain active but slightly below last year. With harvest starting in late August, a 35% drop in 2024 production and 27% decline in value may tighten supply and firm prices—especially for early-season Bartlett and Anjou.

## peppers bell



The market is up after early season ends in Georgia and North Carolina due to heat, creating a supply gap. The East awaits new volume from Tennessee, Michigan, New York, and Canada, with shortages likely to persist for a couple of weeks. Western supply is steady but tight amid strong demand. Colored bell supply is limited from Eastern Canada and Mexico, though improved weather should boost availability within 10 days.

## peppers chili



Market is up. Eastern supply remains tight, with relief expected as New Jersey and Michigan begin harvesting. Western volume is light but improving, supported by strong quality from California and Baja. Central Mexico offers a moderate supply with some quality concerns.

## pineapples



Availability is improving as the market stabilizes, with larger sizes more accessible and smaller sizes limited. Pricing remains elevated but is beginning to ease, with flexibility in size still important as conditions balance out.

## potatoes



Idaho Burbank supplies remain tight as the season winds down, with strong demand outpacing availability—especially for 40–70 count cartons. Prices are firming. Norkotah harvest begins in early to mid-August, offering some relief ahead of the Burbank harvest in early September.

## squash



The market is steady. Yellow squash supplies are improving in the East as new fields come online. In the West, Washington is at peak production with excellent quality, while Santa Maria and Fresno are actively harvesting.

## tomatoes



The market remains active. Roma, round, and grape tomato supplies are improving nationwide, with strong quality and sizing reported in Eastern regions like Tennessee and Virginia. Grape tomato availability is still limited, keeping prices elevated, though stabilization is expected within 7 days. Western regions—California, Baja, and Mexico—remain steady. The Tomato Suspension Agreement ended July 14 with no anticipated impact on supply or pricing.





# Market UPDATE

*in the news...*

## Will Termination of the Tomato Suspension Agreement Lead to an 'Eggs Moment' for Tomatoes?

As some celebrate the move as a victory for U.S. tomato growers, proponents of the agreement say its end will ultimately be detrimental to the economy and consumers.

Christina Herrick and Jennifer Strailey | July 17, 2025 | [thepacker.com](https://thepacker.com)

On July 14, when the U.S. Department of Commerce terminated the 2019 Agreement Suspending the Antidumping Duty Investigation on Fresh Tomatoes from Mexico and imposed a 17% tariff on most imports of tomatoes from Mexico, reaction from the fresh produce industry was pronounced and deeply divided.

"Mexico remains one of our greatest allies, but for far too long our farmers have been crushed by unfair trade practices that undercut pricing on produce like tomatoes. That ends today," says Commerce Secretary Howard Lutnick, in a news release. "This rule change is in line with President Trump's trade policies and approach with Mexico."

But ag economists and industry researchers say the end of the agreement and tariff hike will put billions in economic activity at risk and threaten tens of thousands of jobs. And they say American consumers are likely

to feel the impact in higher tomato prices at retail, with some ag economists anticipating the price of not only Mexican tomatoes to increase by about 8.5%, but also prices on all tomatoes sold in the U.S.

Whether to extend the 90-day review period or terminate the agreement has been fiercely debated in the fresh produce industry, with those calling for its termination saying it failed to prevent Mexican exporters from dumping below-production-cost tomatoes into the U.S. market, and proponents of the agreement's extension saying the past five Tomato Suspension Agreements did not fail, but rather benefited American consumers.

### Florida Claims Victory

Both the Florida Fruit & Vegetable Association and the Florida Tomato Exchange call the end of the agreement a victory for U.S. tomato growers.



Some ag economists and industry researchers say the end of the U.S.-Mexico Tomato Suspension agreement, along with a related tariff hike, will put billions in economic activity at risk and threaten tens of thousands of jobs. (Photo: batuhan toker, Adobe Stock)

FFVA says this is a positive movement "toward fairer competition, not only for tomato growers but for all specialty crop producers nationwide," stating Mexico dumped imports into the market for too...

[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](mailto: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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