

Market OUTLOOK

Week 31: July 28-August 3, 2025



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Market ALERT

Asparagus
Beans
Blackberries
Brussels
Lemons
Lettuce
Peppers
Pineapples

transportation

Nat'l Diesel Avg: \$3.812↑

Last Year: \$3.779↑

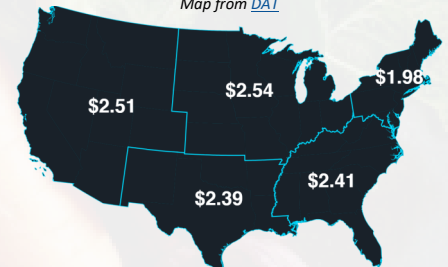
Nat'l Fuel Surcharge: \$0.46

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: Mostly sunny with highs in the low 70s and lows in the low 60s.

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

Yuma, AZ: Sunny skies with highs in the 100s to 110s 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 skies with highs in the upper 80s to 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



RADAR Peru is experiencing extremely limited supply of large, x-large, and jumbo asparagus for the next 2–3 weeks due to cold weather, while small and standard sizes are more available; demand is steady and quality is fair. In Mexico, supply and demand are stable with good quality, though large sizes remain limited and small to standard sizes are more readily available.

avocados



Availability is strong, supported by imports from Mexico, Peru, and Colombia. Prices remain elevated due to seasonal dips in Mexican output. Quality is good, though California water stress may limit domestic supply.

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



Supply remains very tight with moderate demand. Weather issues in Central America are affecting availability and quality, leading to higher prices and reduced shelf life.

berries



Blackberries: **ALERT** Supply is tight, with shortages expected to continue into next week. Mexican volumes are down due to weather, though Watsonville fruit is holding up well.

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

Raspberries: Supply is declining in Mexico due to weather challenges, while fruit from Watsonville continues to perform well with good quality.

Strawberries: Volumes are past their seasonal peak and are declining. As the season progresses, berry sizing is expected to trend smaller.

broccoli



Broccoli: Supplies have improved as Mexico recovers from rain-related quality issues. Most shipments are from Salinas and Santa Maria, CA. Quality is fair, and lighter demand has softened the market. Expect steady supply and pricing in the coming weeks.

Broccolini: Supply remains strong with excellent quality. Shipments are primarily from Salinas Valley. Demand is slightly lower. Expect stable yields and markets ahead.

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.



Market UPDATE

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 are improving with fair quality, including some yellowing and insect pressure. Shipments are from Salinas and Santa Maria, CA. Softer demand has lowered prices. Steady supply and market expected.

celery



Good supplies and quality continue from Salinas and Santa Maria, CA. Expect consistent availability and stable pricing.

citrus



Limes: The market is stable with increased availability of larger sizes. Quality issues persist due to heat and humidity, and prices may rise in August as pack-out yields decline.

Lemons: **ALERT** Harvesting 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 will remain limited through October. Flexibility toward larger sizes is recommended.

Oranges: The market is steady. Valencia harvest has been strong, with fruit sizing peaking at 88 and 113.

corn



The market is firm. Eastern supply remains steady but is in transition, with Georgia now finished

and North Carolina, Virginia, New Jersey, and Delaware gradually ramping up. On the West Coast, California continues to provide strong yields and consistent good quality. The market is expected to stabilize in the near term.

cucumbers



The market remains steady. Supply is improving in the East and steady in the West, with good quality and all sizes available. Volume is increasing weekly.

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.

herbs



Supplies and demand are moderate, but quality varies due to California heat stress and harvest timing. Daily orders and close inspection are advised to ensure freshness.

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.

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.



Market UPDATE

lettuce



Green & Red Leaf: Supplies have improved from Salinas. Demand is down, leading to lower prices. Demand has softened and quality is fair due to light insect pressure. Steady supply is expected next week.

Iceberg: **ALERT** Supplies have tightened due to lower yields. Prices are rising. Quality is fair, with lighter weights and smaller heads. Expect continued limited availability and higher pricing.

Romaine: 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 moved to the Dos Palos district, producing top-tier quality fruit. Sizing is trending toward regular 9ct, while 12s remain limited. No production gaps are expected, but sizing flexibility is advised to ensure full coverage.

Honeydew: Production continues to run large with excellent flavor and strong brix levels. Supply is steady and quality is high, with no major disruptions anticipated.

mushrooms



Supplies are expected to remain steady, with good demand and quality reported. White mushrooms remain popular, 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.

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.

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. Green bell supply is extremely tight in the Eastern U.S., with only small volumes of retail-quality fruit from New Jersey. Relief is expected as Tennessee, Michigan, and New York begin harvesting. In the West, Fresno is producing moderate volumes, but strong Eastern demand is straining supply. Upcoming crops in Hollister and Washington may ease pressure. Colored bell supply is light in Eastern Canada due to heat, while Western Canada remains stable. Central Mexico offers light to moderate volumes, with red bells tighter this week.



Market UPDATE

peppers chili



Market is up. Eastern supply remains tight with Georgia's season ending and limited local production. Relief is expected as New Jersey and Michigan begin harvesting. In the West, Nogales crossings are minimal and Baja is ramping up. California and Central Mexico have light to moderate volumes. The overall supply should improve gradually by mid-August.

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 supply remains tight, with strong demand—especially for 40–70 ct—outpacing availability. Prices are firming. Norkotah harvest

starts early to mid-August, offering relief ahead of Burbank's early September harvest.

squash



The market is steady. Supply has improved overall with more regional programs coming online.

tomatoes



The market is steady. Roma production is consistent across the U.S. and Mexico. Eastern round tomatoes have light to moderate volume with weather-related quality issues in Virginia and Tennessee, while California and Mexico offer good quality and sizing. Grape tomato supply is improving, led by Virginia and Tennessee, with moderate volumes and solid quality also coming from Mexico and other Eastern states.

produce in **PEAK** for August

Apples	Cherries	Potatoes
Avocados	Grapes	Tomatoes
Broccoli	Melons	Zucchini
Celery	Pears	



Market UPDATE

in the news...

What's Driving the Boom in Berries

The Aneberries international conference and expo in Guadalajara, Mexico, kicked off July 23 with a look at berry consumer shopping trends from The Packer's 2025 Fresh Trends report.

Jennifer Strailey | July 24, 2025 | thepacker.com

On The Aneberries international conference and expo in Guadalajara, Mexico, July 23-24, which welcomed a record 3,000 attendees to its 15th annual event focused on the global berry market, kicked off with a look at berry consumer shopping trends from The Packer's 2025 Fresh Trends report.

Based on a survey of more than 1,100 consumers across the U.S., Fresh Trends 2025 surveyed shoppers about their fresh fruit and vegetable purchasing habits in 50 commodities — including berries — over the prior 12 months. Fielded in February, Fresh Trends 2025 also surveyed five generations (Gen Z, millennials, Gen X, baby boomers and traditionalists) about what and why they buy in the produce department.

Berries by the Numbers

The total berry category continues to dominate. Dollar sales for the berry category were over \$12.5 billion, according to Circana OmniMarket Integrated Fresh retail data for the 52-week period ending June 15, 2025, up 7.5% over a year ago. That's dollar sales more than twice what the next leading produce category — grapes — posted for that same time period.

When it comes to berry types most purchased, Fresh Trends 2025 finds that strawberries and blueberries lead the category with 54% of consumers reporting purchasing the berries in the last 12 months. Blackberries came in next at 34%, and raspberries were the least-purchased berry in the category at 30%.

Blackberries Resonate With Older Shoppers

Fresh Trends 2025 found that higher-earning consumers with an annual household income greater than \$100,000 were the most frequent purchaser of blackberries at 46%.

Older consumers were also among the most frequent purchasers of conventional blackberries with 71% of those aged 50 to 59 and 73% of those aged 60 or older reporting they purchased them in the last 12 months.

A look at conventional compared to organic blackberry sales shows a decided consumer preference for conventional. Of those who purchased blackberries in the last 12 months, 52% said they prefer conventional blackberries compared with 20% of those who only purchased organic. Twenty-five percent of consumers



The Packer explores the boom in berries at the 15th annual Aneberries conference and expo in Guadalajara, Mexico.
(M.studio, Adobe Stock)

reported buying both conventional and organic blackberries.

But a key takeaway from Fresh Trends 2025 was that younger consumers are buying more organic produce, and despite being most sensitive to food inflation, they are also more willing to pay more for organic. This is evident in the berry category as well with 36% of Gen Z and 24% of millennials reporting purchasing organic blackberries compared with just 15% of Gen X and 5% of baby boomers.

[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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