

# Market OUTLOOK

Week 34: August 18-24, 2025



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Market ALERT

Asparagus  
Blackberries  
Brussels  
Cilantro  
Lemons  
Lettuce  
Peppers  
Pineapples

## transportation

Nat'l Diesel Avg: \$3.754↓

Last Year: \$3.704↑

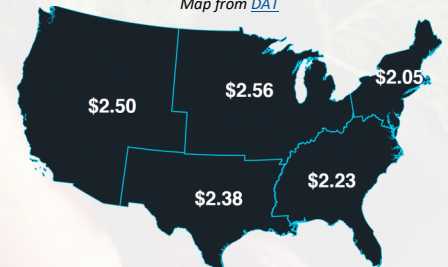
Nat'l Fuel Surcharge: \$0.46

Shortages: Rates are flat

- extreme - DE, MD, VA
- slight - IN, IL

### 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 70s and lows in the low 60s.

**Salinas, CA:** Partly cloudy and sunny skies with highs in the 70s and lows in the 50s.

**Yuma, AZ:** Partly cloudy and sunny skies with highs in the 100s to 110s and lows in the 80s.

**Immokalee, FL:** Mostly sunny and evening thunderstorms 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 remains active but slightly below last year's volume. Harvest is underway, led by Gala, Honeycrisp, and Fuji varieties.

## asparagus



Supplies are tight on both coasts. Large sizes are limited, while Smalls and Standards are more available. Cooler weather in Peru and regional transitions in Mexico are slowing production and pushing prices up. Tight conditions are expected to continue for a couple of weeks. Opening size specifications is recommended.

## avocados



Mexico's Loca crop is performing well, with strong availability on 48ct and smaller sizes. Lower dry matter improves shelf life. The upcoming Aventajada crop is expected to bring more volume and larger sizes. California and Peru will remain in the market through October. Colombia's main crop is expected in November. Temperature recommendations: Mexico Flora Loca = 44°F, CA/COL/PERU = 42°F.

## bananas



Supply is slightly tightening in select zones, but overall remains serviceable. Quality is consistent, and pricing is mostly flat, with minor freight-related adjustments possible. Regional availability should be monitored.

## beans



The market is trending downward, especially in New York. Both supply and demand are moderate, leading to lower prices. Quality remains stable with no major changes expected in the short term.

## berries



**Blackberries:** **ALERT** Supplies remain light. Improvement is expected in the next couple of weeks.

**Blueberries:** The season is in full swing with good volumes and excellent quality.

**Raspberries:** Production is rising in Mexico and Watsonville, supported by improving weather and strong fruit development despite recent storms and cooler conditions.

**Strawberries:** Santa Maria is seeing strong production with firm, vibrant fruit and expanding volumes. In Watsonville-Salinas, quality remains steady, though some varieties soften in the afternoon. Slight volume dips are possible.

## broccoli



**Broccoli:** Supplies remain strong with some product from Mexico. Most shipments are from Salinas and Santa Maria, CA. Quality has improved, while lighter demand is softening markets. Expect steady supply and pricing ahead.

**Broccolini:** Supplies and quality are good, with most product from Salinas Valley. Demand has dipped slightly. Yields and market conditions are expected to remain stable.

## brussels sprouts



Supplies are improving, currently sourced from Mexico. Quality remains fair. Expect better supply and pricing in the coming weeks as Salinas, CA begins shipping.

## cabbages



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





# Market UPDATE

## carrots



Supply and quality remain strong across all shipping regions, with balanced and steady sizing. Demand is firm, pricing is stable, and no disruptions are expected in the short term.

## cauliflower



Supplies remain strong with improved quality. Most shipments are coming from Salinas and Santa Maria, CA. Demand has softened, leading to lower market prices. Expect steady supply and pricing in the coming weeks.

## celery



Supplies and quality are strong, with shipments from Salinas and Santa Maria, CA. Markets are stable and expected to remain steady.

## citrus



**Limes:** Prices are climbing due to reduced yields and fewer crossings through McAllen. Elevated pricing is expected to persist through August.

**Lemons:** **ALERT** Harvest continues in District 2, but fancy grade percentages are low due to earlier wind damage. Sizes peak on 140s and 115s, while smaller sizes (165s and below) are limited and may affect availability through October.

**Oranges:** Valencia harvest is strong, with solid volume and consistent quality. Fruit sizing peaks on 88s, followed by 113s.

## corn



East Coast production is ramping up, with pricing expected to stabilize. West Coast prices are steady, supported by stable supply and favorable growing conditions.

## cucumbers



Supplies are good with solid quality. Michigan and New York lead in the East, while Baja and Central Mexico supply the West.

## grapes



Production is transitioning from Mexico to California, with excellent color and quality. Expect firmer pricing and some variety gaps during the transition, with normalization as California volume increases.

## herbs



Availability is fair but inconsistent. Heat stress and irregular harvests in California are affecting delicate varieties like tarragon. Quality varies by shipment; daily ordering and careful inspection are recommended.

**Cilantro:** **ALERT** Supplies are lighter with good quality. Demand is up, and pricing remains elevated with limited availability expected.

## kale



Supplies are steady with strong demand and good quality. Shipping from Salinas, CA. Market conditions are stable.

## lettuce



**Green & Red Leaf:** Supplies are steady and demand is up. Market pricing is firm and quality is fair due to insect pressure (aphids). Steady supplies are expected.

**Iceberg:** **ALERT** Supplies are very light this week due to lower yields, which are pushing markets higher again; early signs of INSV virus have also been reported. Demand has picked up and quality is only fair as growers face insect





# Market UPDATE

## lettuce cont...



pressure, particularly from aphids. Carton weights are expected to be light, with some smaller heads observed. Limited availability and elevated pricing are anticipated.

**Romaine:** **ALERT** Supplies are light this week. Demand has increased, but quality is reported as only fair due to light insect pressure. Early signs of INSV virus are beginning to show, which may impact yields at the field level. Lighter carton weights are expected, and markets are anticipated to escalate over the next few weeks.

**Tender Leaf:** Supplies and quality are very good with strong demand. Now shipping from Salinas, CA. Expect steady markets and supply.

## melons



**Cantaloupe:** Production has shifted to Dos Palos, delivering premium quality and strong brix levels. Supply is steady, with a skew toward regular 9ct sizing; 12s remain limited. No production gaps are expected, and sizing flexibility is important as harvest cycles normalize.

**Honeydew:** Production running large with good quality from the Dos Palos region. Supply remains consistent, and harvest cycles are stabilizing, making sizing flexibility key to meeting demand.

## mushrooms



Steady supplies and good quality reported. Demand is strong, especially for white mushrooms. Specialty and organic varieties are seeing increased interest. Expect stable markets through August.

## 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 from Mexico, but quality is fair due to excess heat impacting yields. Expect limited availability and rising market prices 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



Green bell availability is improving as Eastern regions begin harvesting. Western areas show strong quality and steady volumes. Red pepper supply remains tight due to heat stress in Canada and limited volume from Mexico. California's supply is steady, but demand exceeds availability, keeping the market elevated.

## peppers chili



Eastern chili supply is light to moderate, sourced from MI, NJ, NC, and NY. Western supply is stable from CA, Central Mexico, and Baja, with good quality. Serrano production in Mexico is low, with much retained for domestic use, reducing border crossings and driving up prices.





# Market UPDATE

## pineapples



The market is stabilizing, with availability shifting toward larger fruit (5s and 6s), while smaller sizes (7s and 8s) remain limited. Supply conditions are improving, but tightness in certain sizes will persist. Sizing flexibility is recommended through early August.

## 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. The Russet Norkotah harvest begins in early to mid-August, offering some relief ahead of the Burbank harvest in early September.

## squash



Supply is strong overall, with Michigan leading in the East. Zucchini quality is solid, but yellow squash is tighter due to scarring. In the West, Santa Maria's output slowed from cooler weather, while Fresno remains steady.

## tomatoes



Roma tomato supplies are light to moderate, led by Tennessee in the East and steady quality from California and Central Mexico in the West. Round tomato yields are light in the East due to weather, with Virginia transitioning; Western supply is steadier, with Baja offering top quality. Grape tomato volumes are tight in the East but meeting demand, while Baja and Central Mexico maintain stable Western supply.







# Market UPDATE

*in the news...*

## Project Seeks to Help Plants Fight Pathogens in Rising Temperatures

A global study looks at how plants respond to pathogen stress in elevated ozone levels to breed more resilient plants.

Christina Herrick | August 4, 2025 | [thepacker.com](https://thepacker.com)

A global project seeks to help plants better fight pathogens as temperatures rise. Courtney Leisner, assistant professor at the school of plant and environmental sciences at Virginia Polytechnic University, is part of this global project, which seeks to study bacterial spot. *Xanthomonas*, the pathogen that causes bacterial spot, is a significant threat to tomato and pepper growers worldwide. The pathogen can infect nearly 400 different plant species, and there is no known cure.

"We have existing data to show that when pepper plants that are resistant to *Xanthomonas* are inoculated with *Xanthomonas* and exposed to ozone stress that the resistance breaks down," she says. "This made us interested in understanding how temperature would impact the virulence of *Xanthomonas* and the ability of pepper to mount a defense response to *Xanthomonas*."

She says preliminary research shows that as pepper plants are exposed to a pathogen or elevated ozone levels alone, the plants respond differently than when exposed to combined stress of a pathogen and elevated ozone levels.

"The combined stress is more akin to a

normal growing environment, so by doing a multifactorial stress experiment we aim to understand more about how plants respond in a natural growing environment," Leisner says. "We hope this will lead to translational outcomes for the fresh produce industry by developing pepper plants that have durable resistance to *Xanthomonas* even as growing temperatures rise."

This study is part of a joint agreement between the U.S., Germany and UK to future roof plants.

"This international team is able to leverage their expertise in plant pathology, bacteriology and physiology to understand not only how pepper plants can defend themselves from path pathogens with rising temperatures, but how virulence or the pathogen may also change with rising temperatures," Leisner says.

Leisner says the plants are first germinated in a greenhouse, then inoculated with the pathogen for testing.

"We then place the plants in the open-top chambers (located at Auburn University) and elevate the air temperatures around the plants using heated air that blows into the chambers," she says.



Pepper plants  
(Photo: Adobe Stock, Andrii Yalanskyi)

Research contributor Neha Potnis, associate professor of bacteriology at Auburn University, will study the environmental factors that influence the plant's pathogen dynamics, and Leisner will assess physical, chemical and biological changes in the peppers from heat stress.

"The end goal of this project is to establish durable management of resistance genes in pepper in the context of variable environmental conditions," Leisner says.

[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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