

Market OUTLOOK

Week 33: August 11-17, 2025



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Market ALERT

Asparagus
Beans
Blackberries
Brussels
Lemons
Lettuce
Peppers
Pineapples

transportation

Nat'l Diesel Avg: \$3.800↓

Last Year: \$3.755↑

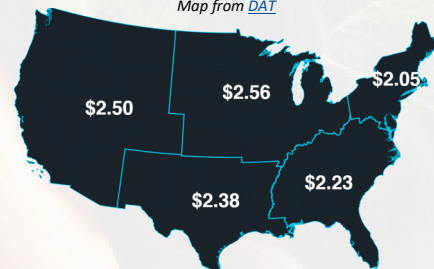
Nat'l Fuel Surcharge: \$0.46

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 low 70s and lows in the low 60s.

Salinas, CA: Partly cloudy skies with highs in the 60s to 70s and lows in the 50s.

Yuma, AZ: Sunny skies with highs in the 100s to 110s and lows in the 80s and upper 70s.

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

Idaho Falls, ID: Mostly sunny 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.

asparagus



Supply remains extremely limited and is expected to stay tight for 1–2 weeks. Domestic volumes are tapering off, while Peruvian imports remain low with fewer containers projected. To support order fulfillment, expanding size specs is strongly advised. Overall quality is good, though some may show heat stress due to recent high temperatures in key growing regions.

avocados



Supply is strong from Mexico, Peru, and Colombia, though domestic output is limited by water stress in California. Demand remains high. Quality is generally good, but ripening programs may need adjustment due to firmness variability.

bananas



Supply is tightening in select regions but remains manageable. Quality is consistent, pricing stable, with minor freight-related shifts possible. Continuing monitoring of regional availability is advised.

beans



RADAR Green bean supply remains tight, especially for French beans, due to ongoing weather issues in Central America. Demand is moderate to high. Quality is variable—expect differences in appearance and texture. Frequent deliveries are advised to maintain freshness.

berries



Blackberries: **ALERT** Supplies remain light, with improvement expected in the coming weeks.

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

Raspberries: Production is increasing in Mexico and Watsonville, driven 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 is steady, though some varieties soften in the day. Slight volume dips may occur.

broccoli



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

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

brussels sprouts



Supplies remain light from Mexico, with only fair quality. Continued shortages and elevated pricing are expected until Salinas production ramps up.

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 are good, with fair quality from Salinas and Santa Maria. Softer demand is easing market pricing, with steady conditions expected ahead.

celery



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

citrus



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

Lemons: **ALERT** Harvest continues in District 2. Fancy grade percentages are lower due to earlier wind damage. Sizes peak on 140s and 115s, with limited smaller sizes potentially impacting availability through October.

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

corn



East Coast prices are rising due to reduced acreage and weather delays. West Coast pricing remains steady or slightly lower with stable supply and favorable 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 shifting 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; daily ordering and careful inspection are advised.

Cilantro: **ALERT** Supplies are lighter with good quality from Oxnard and Salinas. Demand is good, keeping pricing elevated with limited availability.

kale



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

lettuce



Green & Red Leaf: Supplies and demand are steady from Salinas, with firm market pricing. Quality is fair due to aphid pressure. Conditions expected to hold next week.

Iceberg: **ALERT** Supplies are light due to lower yields and strong demand. Fair quality from Salinas and Santa Maria, with light weights and smaller heads. Expect tight supply and elevated pricing.



Market UPDATE

lettuce cont...



Romaine: Supplies are light with rising demand. Product from Salinas and Santa Maria, CA. Fair quality due to aphids and signs of INSV virus. Lighter weights and escalating markets expected.

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 with premium quality and strong brix. Supply is steady, skewing toward 9ct with limited 12s. Sizing flexibility is key as harvest cycles normalize.

Honeydew: Production is running large from Dos Palos with excellent internal quality. Supply is consistent, and stabilizing harvest cycles make 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 active regions with steady demand. Product is available from Arizona, California, and Georgia, as production shifts from New Mexico to Idaho/Oregon.

onions green



Supplies are steady but limited from Mexico. Quality is fair due to heat-related issues. Expect reduced yields and elevated 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



Green bell availability is improving in the East, with strong quality and steady volumes in the West. Red bell supply remains tight due to heat stress in Canada and limited volume from Mexico. California is steady, but demand exceeds supply. Market conditions likely to stay tight short-term.

peppers chili



Supplies are gradually improving. Michigan and New York are boosting Eastern availability, while California and Baja lead in the West. Jalapeños show good quality, but habaneros remain limited. Washington will begin harvesting soon, with broader availability expected by mid-August.

pineapples



The market is stabilizing with a shift toward larger fruit; smaller sizes remain limited. Supply is improving, but tightness in certain sizes will persist. Sizing flexibility is advised through early August.

potatoes



Idaho Burbank is wrapping up for the season, with firming prices. Norkotah harvest has begun, offering some relief ahead of Burbank's return in early September.



Market UPDATE

squash



Supply is good overall, with Michigan leading in Eastern volume. 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 production is steady in Tennessee with

good quality, supported by light volumes from North Carolina and Alabama. Michigan will soon boost Eastern supply. California and Mexico lead in the West with excellent quality and sizing. Round supply is stable as Tennessee ramps up. Eastern grape volumes are lighter due to weather, with support from Tennessee, New Jersey, and Michigan. Western supply from Baja and Central Mexico remains steady.

in the news...

What it Takes to Grow Produce in Space

Murat Kacira, director of the University of Arizona's Controlled Environment Agriculture Center, explains the Mars Lunar Greenhouse Prototype project and how space ag and Earth's CEA isn't too different.

Kerry Halladay | July 27, 2025 | thepacker.com

On Unlike the future Gene Roddenberry depicted in Star Trek, we don't have replicators to deal with space-faring food needs. (Yet?) So, food must be either taken to space or grown there.

"The ability for us to grow fresh food in space is an essential part of the solution to the challenges for NASA's long-duration human exploration of the moon and beyond," says Murat Kacira, director of the University of Arizona's Controlled Environment Agriculture Center, in his July 24 presentation at the "Training the Next Generation of Space Farmers" webinar, part of the SpaceAg Conversations series put on by Agritecture.

Considerations of space ag

Kacira told webinar participants about what it takes to grow fresh produce in space.

"When we consider space exploration, the resources are limited," he says.

These limitations present unique challenges. At the most basic, any food-growing system, what Kacira calls a bioregenerative life support system, has to work without external inputs. Everything including air, water, nutrients and waste products must be reliably recycled into the system.

"A truly closed bioregenerative life support system must handle feedback loops, for instance, like one crop failing



If humans are going to explore space, we must figure out how to grow crops on other planets. (iStock/Lori Hays)

or an unexpected microbial...

[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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