

Market OUTLOOK

Week 36: September 1-7, 2025



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Market ALERT

Asparagus
Blackberries
Lemons
Lettuce
Peppers Bell
Pepper Chili
Pineapples

transportation

Nat'l Diesel Avg: \$3.708↓

Last Year: \$3.651↑

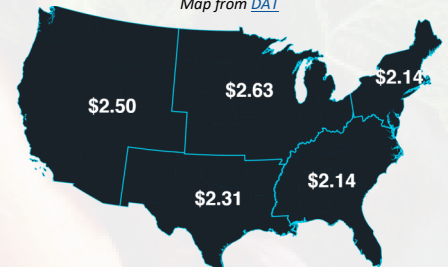
Nat'l Fuel Surcharge: \$0.46

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: Mostly sunny and partly cloudy skies with highs in the 70s and lows in the 50s.

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

Immokalee, FL: Scattered thunderstorms with highs in the low 90s and lows in the 70s.

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 80s and lows in the 40s and 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



Supply remains tight, with XL and Jumbo sizes nearly unavailable. Cooler weather in Peru and gaps in Mexico are driving smaller yields and more standard-size substitutions. Limited volume expected for 2–3 weeks; opening size specs are strongly advised.

avocados



The Aventajada harvest is underway in Mexico, overlapping with Loca to keep supply strong through fall. With California and Peru tapering off, Mexico is set to meet rising demand, projecting 2.3 billion lbs. to the U.S.—up 100 million lbs. from last year. Added volume and a balanced size curve support stable markets and strong promotional opportunities. With favorable pricing, momentum is expected to carry through the end of the year.

bananas



Supply remains stable with isolated tightness due to port congestion and regional variability. Minor freight-related cost pressure may emerge, but overall conditions are steady.

beans



The market remains stable with moderate supply and demand. Product out of New York is consistent, with no reported quality issues or disruptions.

berries



Blackberries: **ALERT** Volumes are improving, though recent rainfall in Mexico may cause short-term dips. Overall quality is recovering, and supply is expected to stabilize as weather conditions normalize.

Blueberries: Supply is tightening as seasonal production declines, with prices likely to rise next week. Strong demand and reduced availability are contributing to market pressure.

Raspberries: Supply remains strong and stable through September, with consistent volumes and quality. A brief dip is anticipated in October due to seasonal transitions, followed by a quick rebound.

Strawberries: Volumes are steady in northern regions, with slight increases expected from southern areas as September approaches. Quality is consistent, and growing conditions remain favorable.

broccoli



Broccoli: Supply remains steady with shipments primarily from Salinas and Santa Maria and additional volume from Mexico. Quality is fair. Increased demand is driving markets upward. Continued steady supply is expected in the coming weeks.

Broccolini: Supplies remain strong with excellent quality from Salinas Valley. Slight dip in demand, but yields and markets are stable. Ideal time to promote Broccolini.

brussels sprouts



Supplies and quality are improving from Salinas and Mexico. Continued growth is expected, with market pricing trending upward.



Market UPDATE

cabbages



Supplies and quality have improved out of Central California, with steady yields and stable market pricing expected to continue.

carrots



Volumes remain consistent, with strong internal quality across most regions. Demand and pricing are stable.

cauliflower



Supplies remain strong with improved quality from Salinas and Santa Maria. Slight increase in demand; pricing holds steady. Continued stable supply is expected.

celery



Supplies remain strong with good quality from Salinas and Santa Maria. Markets and volume are expected to stay steady in the coming weeks.

citrus



Limes: The market has softened as prices fall below grower expectations, prompting shippers to reduce pricing to move inventory ahead of the holiday weekend and anticipated post-holiday slowdown.

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 steady, with Michigan and New York leading in the East and Baja/Central Mexico covering the West.

grapes



California supply is showing excellent quality with strong sugar content and consistent sizing. Availability is tighter than expected, especially for green seedless. Seasonal varieties are arriving, but demand remains high. Pricing is firm and may trend upward as volume builds.

herbs



Demand continues to grow, led by basil, as consumers favor natural and organic options. The U.S. herb market is growing at 8.4%. Supply is stable, supported by better farming and packaging practices.

Cilantro: Supplies are steady out of Oxnard and Salinas with fair quality and good demand. Market pricing and volume are expected to improve in the coming weeks.

kale



Supplies and quality are strong out of Salinas with steady demand and stable market pricing. Volume is expected to remain consistent in the coming weeks.



Market UPDATE

lettuce



Green & Red Leaf: Supplies are light out of Salinas with increased demand and firm markets. Quality is fair due to aphid pressure. Light volume is expected to continue into next week.

Iceberg: **ALERT** Supplies remain light with lower yields and early signs of INSV. Shipments from Salinas and Santa Maria show fair quality due to aphid pressure, with lighter carton weights and smaller heads. Markets are escalating; expect continued tight supply and elevated pricing.

Romaine: **ALERT** Supplies remain light from Salinas and Santa Maria with fair quality due to aphid pressure and early signs of INSV. Yields are being impacted, leading to lighter carton weights. Markets are firm and expected to escalate in the coming weeks.

Tender Leaf: Supplies and demand remain strong with good quality out of Salinas. Markets and volume are expected to stay steady in the coming weeks.

melons



Cantaloupe: Production has slowed slightly due to cooler temps, with peak volume now behind us. Eastern demand is shifting back to California as regional deals wind down. Pricing is trending higher, especially on larger fruit. Sizing remains mostly 9/12s with some 15s expected over the next 7–10 days. Overall quality is strong with consistent netting, vibrant shell color, and excellent internal brix levels at 14–16%.

Honeydew: Jumbo sizes are phasing out, with 6s now dominant. A brief slowdown is expected, pushing markets slightly higher. External quality remains clean, with brix levels holding at 13–15%, supporting strong internal quality and flavor.

mushrooms



Supplies and quality remain steady with strong demand. White mushrooms lead foodservice popularity, while interest in specialty and organic varieties continues to grow.

onions



Early harvest and favorable weather have supported strong crop development and sizing. Supply is solid across all sizes and colors, with good quality expected, weather permitting. The market is volatile but expected to mirror last year: prices may dip in the short term, stabilize by late September/October, and remain flat through March/April. A brief gap in availability is likely early to mid-October as Idaho transitions to a cured storage crop, typically lasting one to two weeks.

onions green



Supplies remain steady from Mexico with fair quality due to prior heat stress. Light volume is expected in the coming weeks; market pricing remains stable.

pears



Washington's Q3 crop volumes are expected to remain active but slightly below last year. Harvest begins in late August and runs through September. Production in 2024 was down 35% year-over-year, with a 27% drop in value, potentially tightening supply and firming prices—especially for Bartlett and Anjou, which lead early-season shipments.



Market UPDATE

peppers bell



Green bell peppers are steady nationwide. Red pepper supply is tight due to heat and disease in Canada, with Mexico beginning light shipments. Elevated market conditions are expected to continue short-term.

peppers chili



Supplies are stable nationwide, with most varieties available. Eastern sourcing includes North Carolina, Michigan, and local programs, though serranos are limited. Western supply from Baja California, Central Mexico, and Washington is steady despite lighter volumes from Baja and Central Mexico due to crop transitions. Tomatillos are the main concern, with low volume and fair quality, but improvement is expected within 7–14 days.

pineapples



Availability is tighter than expected across all sizes due to soft yields and elevated rejection rates. Larger sizes are especially limited, with 7s–8s also under pressure. Prices remain high, and sizing is inconsistent. Flexibility is recommended through mid-September.

potatoes



Acreage is steady year-over-year, and ideal summer conditions support a strong size profile. Larger counts should be more available than last season. Pricing is expected to remain stable, similar to last year. Demand appears consistent, with no major shifts anticipated. Continued favorable weather will be key to maintaining the outlook.

squash



Supply is strong in the East with generally good quality. Northern growers are winding down, shifting production southward for fall. In the West, warmer weather has boosted output in Santa Maria, Fresno maintains steady high-quality volumes, and Baja adds light supply.

tomatoes



Markets are well-supplied nationwide with strong quality. In the East, Roma and grape volumes are steady, led by Tennessee and Virginia, while round tomatoes are lighter due to earlier weather issues. Out West, California and Mexico maintain consistent, high-quality output across all varieties, with Baja's newer fields producing larger, improved Romas. Supplies are expected to strengthen into early September.





Market UPDATE

in the news...

Triple-digit heat hits lettuce, broccoli, and strawberry harvests in California

Eileen Rodriguez | August 25, 2025 | freshfruitportal.com

Heat waves are traveling through the Western U.S., and the high temperatures are negatively impacting California growers. According to a report by produce distributor PRO*ACT, lettuce, broccoli, and strawberries are among the most affected crops.

The document states triple-digit temperatures are not only impacting produce quality but are also hurting harvesting across the state. Crews have tried adjusting to the scorching weather by starting earlier in the day when the heat is more manageable. However, PRO*ACT says “field conditions remain tough across nearly every commodity.”

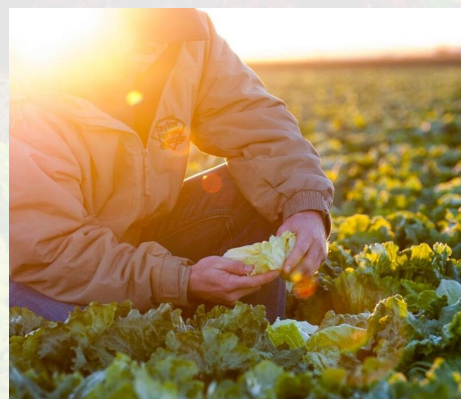
The news came after the National Weather Service issued a dangerous heat-level announcement on Thursday. The advisory warned temperatures

would put people of all ages at high risk of heat-related illness when outdoors or without access to air conditioning. Authorities have also issued alerts warning about conditions that could lead to explosive fire spread in counties such as Los Angeles and Ventura.

The effect of heat on cruciferous and leafy greens

Most of the state’s South Coast has been subject to the weather advisory since Wednesday, and this is already hurting broccoli and cauliflower. Crops are decreasing in size, according to the report, with an uptick in pin rot and internal defects. Lettuce is also showing signs of heat-caused burn, mildew, and light weight.

The damage to leafy vegetables could pose an issue for growers, as market demand is set to increase with the



return of kids to school in September.

To deal with the burns, lettuce growers are resorting to trimming affected...

[Read full article HERE](#)

HAPPY
★
LABOR
★ DAY ★

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