

Market OUTLOOK

Week 40: September 29-October 5, 2025



Powered by Foodbuy

Market ALERT

Broccoli
Brussels
Cabbages
Cauliflower
Celery
Citrus
Green Onions
Lettuce
Pineapples

transportation

Nat'l Diesel Avg: \$3.749↑

Last Year: \$3.539↑

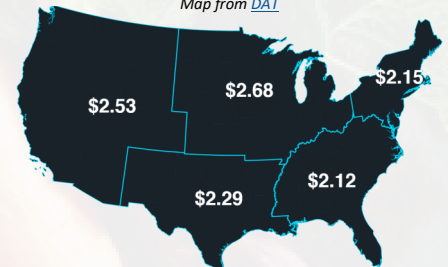
Nat'l Fuel Surcharge: \$0.46

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 70s and lows in the lower 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 upper 90s and lows in the 70s.

Immokalee, FL: Mostly sunny and partly cloudy skies with highs in the 80s and 90s and lows in the lower 70s.

Idaho Falls, ID: Partly cloudy with highs in the 60s and 70s and lows in the 30s and 40s.



Powered by Foodbuy



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



Baja production is down due to field transitions from north to south, with Baja South opening early after a recent tropical storm. Peruvian volume and sizing are improving, but arrivals are delayed by shipping issues. Markets remain active with reduced Mexican supply and Peru just ramping up.

avocados



Uruapan is entering a strong mid-season with favorable weather supporting consistent sizing and quality. Harvest volumes will rise slightly next week, with good packouts and minimal delays. The size curve peaks on 60s and 70s, with 48s increasing and 84s tapering off. Expect a gradual shift to larger fruit through October. Internal quality is excellent, and external appearance remains clean with minimal blemishes.

bananas



Supply is steady, though some shipping lanes are tightening due to logistics delays. Market pricing is beginning to reflect this trend. Availability is consistent but should be monitored.

beans



Production remains strong across all regions with improved quality. The transition to southern areas continues. French Beans are limited this week due to rain-related harvest impacts and container delays.

berries



Blackberries: Watsonville quality is strong despite minor issues. Mexico's afternoon rains are affecting fruit, but volume targets should be met.

Blueberries: Pacific Northwest season is ending. Mexico's harvest is delayed by rain; Peru is supplying high-quality fruit with good size.

Raspberries: Watsonville production is down and may end early due to pests and weather. Mexico's weather is impacting quality, currently rated fair.

Strawberries: Watsonville and Santa Maria report smaller fruit and some heat-related quality issues. Volumes are rising, but Watsonville/Salinas is winding down with reduced acreage.

broccoli



Broccoli: Supplies remain tight with subpar quality due to Diamondback moth pressure. Mexican product is available but continues to show quality concerns. Softer demand is holding markets steady. Expect limited availability and firm pricing in the coming weeks.

Broccolini: Supplies are very limited, and quality is poor due to flowering from warm weather. Product is shipping from Salinas Valley. Increased demand has driven up market pricing, which is expected to remain high with limited availability.

brussels sprouts



EXTREME Supplies are light from Salinas and Mexico, with only fair quality. Heavy insect pressure is affecting quality. Expect very limited supplies and strong pricing due to increased demand.



Market UPDATE

cabbages



Supplies are light with lower yields and fair quality. Product is from Central California, where Diamondback moth pressure is affecting crops. Expect increased market pricing and limited supplies.

carrots



Supply is strong and stable across all regions. Quality and sizing have normalized. Pricing and demand remain steady.

cauliflower



RADAR Supplies are average, with fair quality and increased demand. Most product is from Salinas and Santa Maria, CA. Market pricing has risen and is expected to escalate next week due to lower projected supplies and insect pressure.

celery



Supplies are lighter this week, with fair quality reported from Salinas and Santa Maria. Expect continued light supplies and rising market prices over the coming weeks.

citrus



Limes: Market remains steady. The crop has shifted to new production, yielding smaller fruit with strong color and quality. Larger fruit is limited and priced accordingly.

Lemons: **ALERT** Harvest continues in District 2, with peak sizes at 140s and 115s. Smaller sizes (165s and below) remain limited, potentially impacting availability through October. District 3 is expected to start in early October to support smaller fruit supply.

Oranges: **ALERT** Valencia are currently peaking

on 88s, with very limited availability of 113s and 138s due to strong school demand.

corn



Market is steady. Quality and supply are good on both coasts.

cucumbers



Eastern volumes are up, driven by strong production from North Carolina and Georgia, while northern regions wind down. Florida will join by mid-October. In the West, Baja leads with good quality, while Central Mexico and Sonora contribute lighter, developing volumes.

grapes



Production is in full swing with excellent quality, though some varieties are tightening. Red and green seedless volumes are strong but, trending downward. Pricing is firm as demand grows.

herbs



Basil is strong in Colombia, Mexico, and the West, though heat affects quality. Tarragon is improving; chervil remains limited due to Ecuador weather. Most herbs are stable, but heat continues to impact chervil, marjoram, and tarragon.

Cilantro: Supplies are steady with fair quality and good demand. Market pricing and supplies are expected to improve over the next few weeks.

kale



Supplies and demand are steady, with good quality reported. Shipments are from Salinas, CA. Market pricing remains stable.



Market UPDATE

lettuce



Green & Red Leaf: Supplies and demand are steady. Quality is fair due to insect pressure from warm weather. Expect fair quality and steady pricing in the coming weeks.

Iceberg: **RADAR** Supplies are steady but yields are down due to INSV virus. Demand is down, and quality is fair with light weights and smaller heads. Expect stable markets and supplies for the next few weeks.

Romaine: Supplies are steady with good demand. Quality is fair due to insect pressure and signs of INSV virus. Expect lighter weights and smaller heads, with steady markets and supplies.

Tender Leaf: Supplies and demand are steady, with good quality reported. Expect stable markets and supplies in the coming weeks.

melons



Cantaloupe: Dos Palos is in full production, delivering peak-season cantaloupes with strong flavor and high sugar. Market sizing is shifting to 9ct and 12Js, while 12s remain limited. Quality is consistently high with solid brix and appearance.

Honeydew: Fruit from Dos Palos are trending larger, mostly packed as 6Js. Internal quality is excellent with consistent brix and smooth exteriors, supported by strong supply and peak-season flavor.

mushrooms



Supplies are light for whites and browns, with fair quality and increased demand. Expect limited availability and steady pricing through October. White mushrooms remain popular, with rising interest in specialty and organic varieties.

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 are very light from Mexico, with fair quality impacted by excess heat. Expect continued limited availability and escalated 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



Supply is adequate with Eastern Canada winding down and smaller fruit. Western Canada maintains steady larger volumes. Central Mexico greenhouses are boosting supply, especially yellow bells.

peppers chili



Supply is tightening in the East with limited variety, but Georgia's crop should improve availability by October. Western volumes are



Market UPDATE

peppers chili cont...



light to moderate, with better quality from Baja and Washington, and stronger production expected from Mainland Mexico by mid-October.

pineapples



Availability has tightened unexpectedly, especially for larger sizes (5s/6s), due to reduced yields from Costa Rica. Demand is outpacing supply, with smaller sizes particularly constrained. Internal quality is strong but variable due to weather.

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



Yellow and zucchini squash are in strong supply across the Eastern U.S., with steady volumes from North Carolina, Georgia, and soon Florida. Western supply is lighter, but Sonora, Mexico has begun harvesting and is expected to improve in quality and volume soon.

tomatoes



Eastern tomato production remains steady across romas, slicers, and grapes, with supply gradually shifting south as cooler weather sets in. North Florida and the Palmetto/Ruskin region are expected to ramp up by mid-to-late October, supporting continued availability. In the West, California is delivering high-quality, larger-sized fruit, while Mexico's production is expected to rebound soon. Overall, quality and sizing are strong across all varieties, and the market remains favorable.

produce in **PEAK** for October





Market UPDATE

in the news...

In the Eye of the Beholder: How 'Ugly' Produce is Reshaping the Food Waste Conversation

A new Columbia Business School study, "From People to Produce: How Appearance Bias Fuels Food Waste," reveals how consumer preference for cosmetically perfect fruits and vegetables contributes to billions of pounds of food waste — meanwhile, companies like Misfits Market are working to change perceptions and reduce waste.

Jill Dutton | September 25, 2025 | thepacker.com

At the grocery store, consumers are quick to discard fresh produce that isn't as visually pleasing. The slightly bruised peach, the pitted cucumber or the knobby carrot are often passed over for more cosmetic choices.

This bias is real, according to a Columbia Business School study, "From People to Produce: How Appearance Bias Fuels Food Waste." According to author Jonathan Sperling, the study finds that people who believe outward appearances reflect inner character are more likely to reject unattractive fruits and vegetables.

Roughly 40% of produce in the U.S. goes uneaten, and a significant share of that waste comes not from spoilage but from rejection based on appearance alone, the CBS study shows. Bruised apples, spotted bananas and oddly shaped vegetables are often discarded by farmers, retailers and consumers — even when they are perfectly edible, Sperling says.

According to Sperling, key takeaways from the study include:

- Consumers' personal beliefs drive the rejection of ugly produce: Consumers who believe that a person's appearance reflects their character are more likely to view unattractive produce as lower-quality.
- Not everyone applies this logic:

Consumers who do not hold this belief do not penalize ugly produce and, in some cases, even prefer it.

- An intervention can help: A simple message of "Different Outside. Same Inside" that highlights that unattractive produce is as tasty, nutritious and enjoyable as typical produce disrupts this behavior and increases consumers' willingness to purchase unattractive produce.
- The intervention was effective in both in-person field tests and Facebook ad campaigns and in two distinct cultures, the U.S. and Singapore, highlighting its broad applicability.
- Importantly, the intervention doesn't reduce acceptance among those who already accept unattractive produce, making it broadly deployable.

In The Packer's Sustainability Insights 2025, food waste reduction remains one of the strongest sustainability motivators for retailers. In 2025, 86% report donating food that would otherwise be wasted (84% in 2024). Nearly half (49%, up from 35% in 2024) partner with vendors who repurpose food and a similar proportion (48%) redirects surplus to in-store foodservice programs. However, only 8% currently partner with food waste reduction apps — suggesting an untapped potential for technology



A new Columbia Business School study, "From People to Produce: How Appearance Bias Fuels Food Waste," reveals how consumer preference for cosmetically perfect fruits and vegetables contributes to billions of pounds of food waste. (Photo: Vadim Zakirov/zakiroff, Adobe Stock)

solutions.

Now, companies like Misfits Market, Beyond Berries and nonprofits like ReFED are trying to change the script, challenging shoppers to see that "ugly" doesn't mean inedible, and sometimes, imperfections can be part of the value.

How Appearance Bias Becomes Food Waste

Consumers who believe that outward appearance signals inner value are more likely to judge unattractive produce as lower in taste, nutrition or texture — and demand steeper discounts or avoid buying it entirely, the study shows.

According to ReFED data, about 28%...
[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!

Your Dedicated NPC Powered by Foodbuy Staff

