

Market OUTLOOK

Week 37: September 8-14, 2025



Market ALERT

Asparagus
Blueberries
Broccoli
Cauliflower
Lemons
Lettuce
Chili Peppers
Pineapples

transportation

Nat'l Diesel Avg: \$3.734↑

Last Year: \$3.625↑

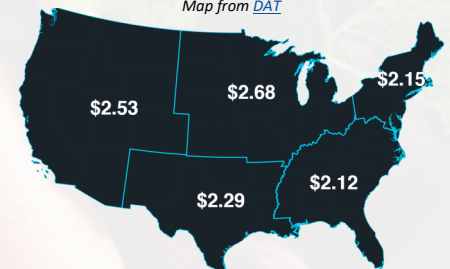
Nat'l Fuel Surcharge: \$0.46

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: Partly cloudy with highs in the 70s and lows in the low 60s.

Salinas, CA: Mostly sunny and partly cloudy skies with highs in the lower 70s and lows in the upper 50s.

Yuma, AZ: Sunny skies with highs in the 90s to 100s and lows in the 70s to 80s.

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

Idaho Falls, ID: Partly cloudy skies with highs in the 70s to 80s and lows in the 40s.



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



RADAR Supply remains tight as Baja winds down and Peru ramps up. Cooler weather in Peru and gaps in Mexico are reducing yields and prompting more standard-size substitutions. Peruvian volume is softening prices slightly, but overall availability will remain limited for 2–3 weeks.

avocados



Mexico's Aventajada crop is now harvesting, overlapping with Loca for several weeks to ensure strong supply through fall. As California and Peru taper off, Mexico is well-positioned to meet increased demand, projecting 2.3 billion lbs. to the U.S. which is up 100 million lbs. from last year. This boost adds over 40 weekly loads, supporting stable markets and promotional opportunities. With favorable pricing and grower participation, supply looks strong through year-end.

bananas



Supply has tightened slightly due to regional weather inconsistencies and logistical constraints. Quality remains steady, though some distributors may experience occasional delays. Pricing is stable, but tighter availability may persist in the short term.

beans



Supplies are steady out of New York with no major quality issues. Overall availability is lighter nationwide, placing green beans on escalation watch. Demand remains strong, and market

pricing is firming slightly due to reduced availability.

berries



Blackberries: Volumes are increasing faster than expected, suggesting a stronger-than-anticipated harvest or supply chain performance.

Blueberries: **ALERT** Supply is tightening due to a decline in domestic production. Imports are arriving in light numbers, and overall availability in September is expected to be limited. Better volumes are anticipated by mid-October.

Raspberries: Supply remains strong and stable, showing no changes in volume or availability.

Strawberries: Volumes remain steady, indicating a consistent supply without major fluctuations in availability.

broccoli



Broccoli: **ALERT** Supplies are very light due to early harvests caused by warm weather, creating a gap. Most product is from Salinas, Santa Maria, and Mexico. Quality is fair, demand is up, and markets are rising. High insect pressure is reported in Santa Maria.

Broccolini: Supplies and quality are excellent from Salinas Valley. Demand is slightly down, but yields and markets are stable.

brussels sprouts



Supplies are good from Salinas and Mexico with improved quality. Demand is up, causing a slight market increase. Steady pricing expected.

cabbages



Good supplies and improved quality from Central California. Market pricing is steady, with consistent supply expected.



Market UPDATE

carrots



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

cauliflower



RADAR Steady supplies with fair quality from Salinas and Santa Maria. Demand and pricing are increasing. Expect lower supplies next week due to insect pressure in Santa Maria.

celery



Supplies are lighter from Salinas and Santa Maria. Quality is good, but expect further tightening and rising prices next week.

citrus



Limes: The market has softened as prices fall short of grower expectations. Shippers have reduced pricing to push out inventory post-holiday.

Lemons: **ALERT** Harvest continues in District 2. The size profile is peaking on 140s and 115s, while smaller sizes (165s and below) remain limited and may affect availability through October. District 3 expected to begin early October to help with smaller fruit supplies.

Oranges: Valencia are currently peaking on 88s, with very limited availability of 113s and 138s due to strong school demand. Substituting up in size may be needed.

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



Eastern supply is lighter but sufficient, with good quality. Fall harvests in North Carolina and Georgia will begin soon. Western supply remains steady, with stronger movement expected into September to support overall availability.

grapes



The market is entering a transitional phase, shifting sourcing regions. Supply is more limited than usual, especially for certain varieties. Expect firm pricing and lower availability until volume builds in the coming weeks. Early fruit from the new region is of good quality.

herbs



Market growth continues, driven by improved farming and packaging. Supply is stable, demand is healthy, and while fresh herbs are on the escalation list due to seasonal shifts, quality remains consistent across most regions.

Cilantro: Supplies are steady with fair quality. Demand is good, and markets are expected to improve as supplies increase.

kale



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

lettuce



Green & Red Leaf: Supplies are light and demand and market pricing are firm. Quality is fair due to aphid pressure. Expect light supplies next week.

Iceberg: **ALERT** Supplies have improved with better yields. Quality is fair due to aphids and early signs of INSV. Expect light weights and smaller heads.



Market UPDATE

lettuce cont...



Romaine: **ALERT** Supplies remain limited from Salinas and Santa Maria. Quality is fair with aphid pressure and signs of INSV. Expect smaller heads, lighter weights, and rising markets.

Tender Leaf: Supplies and quality are very good with strong demand. Expect steady markets and supply.

melons



Cantaloupe: Peak season fruit from Dos Palos shows excellent quality and high Brix (14–16%). Supply of 12ct remains tight.

Honeydew: Supply is steady with good flavor and consistent quality. Sizes vary (5s–6Js); market stable but tighter on smaller fruit.

mushrooms



Steady supplies and good quality are expected through September. Demand is strong, especially for white, specialty, and organic varieties. Market pricing remains stable.

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 with fair quality due to past heat stress. Expect lighter supplies ahead with stable 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



Production is steady across the Eastern U.S. and Western regions, with good quality and adequate supply. Colored bell pepper supply is stable, with improved volumes from Central Mexico and steady harvests in Western Canada. Eastern Canada faces limited output due to earlier weather and disease. Overall, quality is good and supply across all colors is adequate to meet current demand heading into early fall.

peppers chili



Eastern supply is scattered but adequate, with stronger volumes from Michigan, North Carolina, and New Jersey. Western production continues in California, Baja, and Central Mexico. Serrano, Anaheim and Habanero remain limited, while tomatillo quality is improving as new fields begin harvesting.

pineapples



The market remains extremely tight entering the week of September 4, 2025, with limited availability across all sizes and crownless fruit, keeping prices near record highs as demand continues to outpace supply. While quality has modestly improved—average Brix levels reaching 14.0 and fewer fruit testing below 13—pale coloration persists, especially in crownless varieties. Dry weather and port disruptions at Caldera have added logistical strain, though



Market UPDATE

pineapples cont...



contingency measures have prevented major shortages. Imports are expected to remain tight but gradually ease by mid-October, with stronger volumes of larger fruit projected from mid-September through late November before a seasonal dip in December and January. As larger fruit becomes more available, 7ct and 8ct volumes may decline, making substitutes harder to source. Buyers should stay flexible on sizing and expect continued high prices until supply stabilizes, though the steady week-by-week volume increase suggests gradual market recovery heading into Q4.

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 in the East with good quality. Northern growers are winding down, shifting production southward for fall. Western production is led by Santa Maria, Fresno, and Baja. Overall, quality is solid and supply supports early fall demand.

tomatoes



Roma, slicer, and grape tomato crops show strong supply and quality across key regions. Tennessee and Virginia are leading Eastern production, with steady volumes also from Canada, Michigan, and Mexico. California and Mexico continue to support Western markets. Fall harvests are ramping up, especially in slicers and grapes, with good sizing and color. Supply is stable, quality is high, and regional transitions are helping meet market demand.

produce in **PEAK** for September

Avocados	Figs	Mango
Blueberries	Grapes	Parsnips
Brussels	Kale	Plums
Carrots	Leeks	



Market UPDATE

in the news...

More pollination hours and better hive health—the science behind Beeflow technology

Eileen Rodriguez | August 25, 2025 | freshfruitportal.com

The role honey bees play in agriculture is essential, especially for crops that aren't self-pollinating. This is the case with almonds, for example, where a drop in the local bee population directly affects the trees' yield. California supplies 80 percent of the world's almonds, and every one that you eat exists because a honey bee pollinated a blossom.

So it comes as no surprise that growers of pollinator-dependent crops have long sought and hired expert services to maximize bee pollination. But research behind pollination systems has long remained stagnant. This does come as a surprise, as some studies show precision-pollinated plots receive 70 percent more bee visits to flowers on average.

"Growers have been managing pollination in a very informal way," says Matias Viel, CEO of pollination service company Beeflow. "Back in 2016, I found that there was a lot of knowledge out there in academia and a lack of transfer of that knowledge into the industry."

Next generation tailor-made pollination

Beeflow partners with local beekeepers to provide a pollination strategy to growers. The service is tailored to the farmer's crop varieties and genetics, taking details like flower shape and pollen amount into consideration. The

company works with several crops, including blueberries, raspberries, and almonds.

Once they gather initial data, the CEO says, the company feeds the bees with one of its two proprietary molecules, used to "improve bees' health and their performance pollinating crops."

The two products address two major bee characteristics that directly affect pollination: bees' resistance to the cold and their attention span.

Bees don't like low temperatures, preferring to stay inside their hive during the winter. However, if the pollinators are not coming out to spread the pollen due to cold-weather spurts, Beeflow feeds them its first proprietary technology, Max Poll, instead of their usual water and sugar meal.

By enhancing the bees' immune system, Viel says the insects have more energy to pollinate under cooler weather, increasing pollination hours in temperatures under 50 degrees Fahrenheit.

"Instead of the bees beginning pollination at mid-day, the bees are starting to fly earlier, even when it's colder," Viel says.

Pavlovian conditioning—but with bees



The second Beeflow enhancer increases bees' attraction to specific crops by conditioning the insects' memories using certain smells. These liquids are fed to the beehive through a feeder and don't affect the bees' health, says the company.

"We developed some fragrances to feed the bees to help them associate food with a specific fragrance," Viel explained.

Thirty-six Beeflow field trials across the U.S. showed 18 percent more visits to blueberry flowers when the bees are managed under precision pollination compared to conventional pollination...

[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