

Market OUTLOOK

Week 44: October 27-November 2, 2025



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Market ALERT

Asparagus
Berries
Broccoli
Brussels
Cabbages
Cauliflower
Celery
Citrus
Green Onions
Lettuce
Melons
Mushrooms
Tomatoes

transportation

Nat'l Diesel Avg: \$3.620↓

Last Year: \$3.553↑

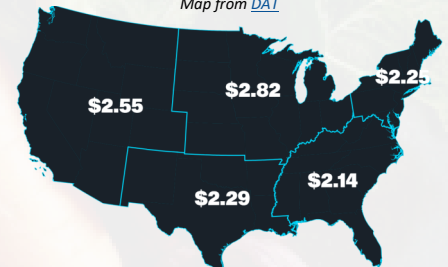
Nat'l Fuel Surcharge: \$0.43

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 skies with highs in the 70s and lows in the upper 50s.

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

Yuma, AZ: Sunny skies with highs in the 90s and lows in the 60s.

Immokalee, FL: Partly cloudy skies with highs in the 80s and lows in the upper 50s and 60s.

Idaho Falls, ID: Partly cloudy with highs in the 40s and 50s and lows in the 20s and 30s.



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Market UPDATE

apples



Washington's 2025 crop is projected to reach 142 million 40-pound boxes, matching the 2014 record thanks to ideal growing conditions—mild temperatures, steady sunlight, and low pest pressure. Harvest began in early August and runs through November, with fruit sizing expected to be larger than last year, though more variable due to hand thinning and natural factors.

asparagus



Supply remains extremely tight, with XL and Jumbo sizes nearly unavailable. Cooler weather in Peru and transitional gaps in Mexico are driving yields toward smaller sizes, prompting increased substitution with standard sizes. Market tightness is expected to persist for 2–3 weeks; temporarily broadening size specs is advised. Prices remain elevated due to low production in Baja, Sonora, and declining Peruvian volume from seasonal and quality factors.

avocados



Mexico's Aventajada and Loca crops are overlapping, driving strong supply through fall. With California and Peru tapering off, Mexico is projected to ship 2.3 billion lbs. to the U.S.—p 100 million lbs. from last year. This growth equates to 40+ extra weekly loads, supporting markets stability and promotional opportunities. Price points are favorable, reminiscent of 2022 levels.

bananas



Supply remains steady across key growing regions, with consistent quality and sizing. Demand is healthy, and pricing has stabilized after earlier cost pressures. The outlook is positive, with reliable availability and good condition expected in the weeks ahead.

beans



Green Beans: Supply remains consistent, supported by favorable growing conditions and steady demand. Pricing is firm but not volatile, with no major disruptions reported.

Snow Peas: The market for remains strong, with lighter volumes arriving from Guatemala due to weather conditions and Peru concluding its season.

berries



Blackberries: Supplies are slightly down due to recent rain, but should improve if dry weather continues. Overall availability is expected to stay strong through November, with higher-elevation varieties helping boost supply.

Blueberries: **ALERT** Delayed shipments caused a brief dip in availability, but more containers are expected soon. Harvest volumes are climbing and projected to peak in early November. While supply is below expectations, it remains solid for the import season.

Raspberries: **ALERT** Production continues in Mexico, Baja, and Oxnard. Supplies are tighter due to rain and seasonal declines in Watsonville and Oxnard. Quality is generally good, though some soft or overripe fruit is showing due to recent heat and humidity.

Strawberries: **EXTREME** Heavy rain has severely impacted crops across key regions. In Watsonville, storms wiped out remaining fields. Salinas is seeing very low volumes, with some growers considering a second pass. Santa Maria and Oxnard received up to 2" of rain in a day, leading to a slow harvest start. Packed fruit is barely meeting quality standards, and workers are struggling to fill containers. These issues are expected to persist for several more days, though conditions may improve later this week.



Market UPDATE

broccoli



Broccoli: EXTREME Salinas Valley supply remains tight, with little short-term improvement expected. Recent hail and shifting weather have worsened already stressed fields, resulting in smaller heads averaging 4–5 inches. Crews are actively managing quality issues including pin rot, brown bead, diamondback moth damage, and mechanical bruising. Uneven growth is also a concern. Limited volumes will support only core demand over the next 1–2 weeks. Relief may be modest when the region transitions to Yuma in late November. Until then, volumes are expected to stay below normal.

Broccolini: EXTREME Supplies remain very limited, and overall product quality is being reported as less than fair. Similar to broccoli, high insect pressure and unusual weather are stressing the plants, affecting product consistency and yields. Growers are currently shipping from the Salinas Valley, and demand has noticeably increased. Due to tight supplies, market pricing has escalated. These challenges are expected to persist, with elevated pricing and limited availability likely continuing until the transition to the Yuma, Arizona growing region in mid to late November.

brussels sprouts



EXTREME Supplies continue to be short in the Salinas Valley due to recent hail and unpredictable weather, which have reduced yields and slowed field recovery. Quality is challenged by uneven sizing and stress-related issues, though crews are working diligently to maintain consistent packs. Availability will stay tight over the next 1–2 weeks, with only gradual improvement expected. Volumes will likely remain below normal until the transition to the next growing region.

cabbages



Supplies from Salinas Valley are fluctuating due to weather and field conditions. Most heads are medium-sized. Crews are trimming carefully and managing insect pressure to maintain quality. Supply may vary over the next week or two but should meet basic demand. Cooler weather may help stabilize conditions.

carrots



Harvest conditions are steadily improving, with cooler weather supporting better sizing and quality. New crop volumes are increasing, helping ease prices where production is consistent. Jumbo remains limited due to fields favoring medium sizes, though relief is expected by late October as California production strengthens. Overall, markets should stay steady to slightly softer. Rain remains a key watchpoint, as it could briefly disrupt harvest or packing.

cauliflower



EXTREME Supply in the Salinas Valley remains very light, with inconsistent head formation and ongoing quality challenges from insects, soft rot, mildew, and discoloration. Crews are working to maintain pack standards, but volumes are still below seasonal norms. While a slight increase in supply may occur later this week, it remains below seasonal norms. For the next 1–2 weeks, most supply will be directed to contract business, with steady conditions expected through the month. Volumes will likely remain below normal until the transition to Yuma in late November, which may offer only modest relief.

celery



Supply in the Salinas Valley is moderate, with firm market conditions and good availability of



Market UPDATE

celery cont...



popular sizes like 24s and 30s. Sizing trends larger with strong case weights, and quality remains solid. Crews are actively managing pith and fusarium to maintain freshness. Steady supply is expected over the next couple of weeks, with stable conditions in the near term.

citrus



Limes: Mexico's market is dominated by smaller fruit; larger sizes are scarce and priced at a premium due to abnormal weather. High temps and humidity have dropped U.S. #1-grade yields to 25–30%, and rain has disrupted harvests. Pricing has stabilized across sizes, though some volatility is expected through November.

Lemons: **ALERT** California's market remains tight, particularly for smaller sizes (165s and below), as District 2 winds down and District 3 ramps up slowly. District 3 fruit is high quality, heavy to Fancy grade, peaking on 140s, while District 1 is yielding larger sizes for export. With imports ending early, offshore support for small fruit is limited. Prices are elevated and expected to hold through October. Mexican supply is tapering off, with Argentina and Chile no longer in the mix. Domestic availability remains tight, and spec flexibility is advised—particularly for foodservice buyers navigating limited options.

Oranges: **RADAR** California is shifting from Valencia to Navel oranges. Valencia supply is tight on smaller sizes (88s, 113s, 138s) due to school demand and crop transitions; larger sizes are more available. Navel shipments began the week of October 20, with clean fruit, heavy to Fancy grade, peaking on 88s. Early picks show light color and small sizing; promotable volumes aren't yet available. Quality is good and sizing will remain small early in the season. Markets will stay tight until promotable volumes arrive, likely

by early November.

cucumbers



Production has shifted south, with Michigan finished and New York wrapping up. North Carolina, Georgia, and Florida are now leading supply, with Georgia showing solid volume despite some field setbacks and Florida just beginning. Quality is strong overall, though aging fields show minor issues. Out West, Baja is producing the best fruit, while Sonora and Central Mexico range from fair to good. Sinaloa is expected to start mid-to-late November, helping support holiday demand.

grapes



Central Valley grapes continue to deliver strong yields and good quality, with volumes surpassing last year. Early October rain caused minor concerns for color and finish, but shippers report minimal impact. Chile and Peru are forecasting larger exports, supporting a smooth transition to winter fruit. Domestic supply remains solid through late October, with seasonal quality expected to taper as late lots clear. Imports from Peru will begin early November.

herbs



Demand for fresh herbs continues to increase, with basil leading in both volume and growth. Supply remains steady, supported by improved farming and packaging practices.

Cilantro: Supply and quality have improved, with shipments coming out of Oxnard and Salinas. Availability is solid, demand remains steady, and pricing has softened slightly—expected to hold stable for the next few weeks.



Market UPDATE

kale



Supplies are steady with fair quality. Demand remains good. Product is shipping from Salinas and Oxnard, and market pricing is stable. Conditions should hold for the next few weeks.

lettuce



Green & Red Leaf: ALERT Supplies are very limited in Salinas Valley with no near-term recovery expected. Storms have caused field damage, worsening disease and insect issues. Lettuce is medium-sized with low case weights. Heavy trimming is reducing yield. Supplies will remain critically low and unpredictable until production shifts to Yuma in mid-November.

Iceberg: EXTREME Supplies are critically low in Salinas, with no short-term relief expected following a damaging hailstorm that severely reduced yields. Most heads are medium-sized with light case weights averaging 36–38 lbs. Fields remain under stress, and crews are contending with quality issues such as bottom rot, rib blight, mildew, insect pressure, soil disease, and INSV. To maintain pack standards, more outer leaves are being removed, further limiting usable product. Even after harvest, the crop is fragile and may have a reduced shelf life. Tight supply conditions are expected to persist over the next couple of weeks, with meaningful improvement unlikely until the transition to Yuma in early November.

Romaine: ALERT Supply is critically low in Salinas due to severe weather and disease pressure. Last week's hail and rain caused major damage, sharply reducing yields. Most heads are medium-sized, with case weights of 30–32 lbs. Crews are managing mildew, bottom rot, tip burn, insect activity, and soil disease, but heavy trimming is reducing usable product. Supplies are tight and

the market unstable until the transition to Yuma in mid-November. Romaine hearts are in critically low supply, with heavy field losses. Heads are medium-sized, weighing 18–22 lbs per case.

Tender Leaf: ALERT Supplies are very limited due to recent hail and weather-related crop damage. Growers are dealing with mildew and soil disease, which have significantly reduced yields. No improvement is expected until the full transition to Yuma in mid-November.

melons



Cantaloupe: Arizona production is yielding mostly jumbo sizes, with less than 2% 12-counts. Quality remains strong post-rain, though some surface residue is present despite added cleaning. Fruit is firm with brix levels between 11–14%. Sizing flexibility at loading is recommended based on daily field variation.

Honeydew: Volume remains extremely limited due to reduced domestic planting and slow import movement through Nogales, though crossings are expected to improve soon. Weather volatility during the fall contributes to lower acreage, increasing reliance on Mexican supply. Scarring and surface residue are typical for the season and may be present despite cleaning efforts. Sizing is concentrated in 5/5Js, with 6s nearly absent. Flexibility at loading is recommended to accommodate daily field variation.

mushrooms



Supplies remain very limited amid rising demand. Quality is fair, with ongoing gnat pressure as many insecticides have lost effectiveness or approval. Cooler weather may help, but supply challenges are likely to persist through late October and potentially into November.



Market UPDATE

onions



Shippers have transitioned to storage crops, with strong supply and consistent quality across all sizes and colors. Market prices continue to ease as demand holds steady. While supply currently exceeds demand, the market is expected to stabilize as the season progresses.

onions green



Supplies from Mexico are gradually improving but still below seasonal averages. Sizing is mostly medium, with some small and large mixed in. Quality is steady with minor cosmetic issues, and availability is expected to strengthen over the next few weeks, returning to normal within a month if favorable weather continues.

pears



Washington's 2025 crop is rebounding after a challenging 2024 season, with growers reporting excellent bloom, minimal frost damage, and strong, uniform sizing. Early estimates suggest the crop could exceed 400,000 tons, returning to pre-2022 levels, thanks to favorable spring weather and improved orchard management.

peppers bell



RADAR Canada's season is tapering off, with sharp volume declines in the east and steadier output in British Columbia. While Western Canada maintains consistent quality and sizing, both have weakened in the east. In Mexico, production remains stable but is expected to dip over the next 3–4 weeks, particularly in Jalisco, before rebounding with new plantings.

peppers chili



Harvests continue across New Jersey, North Carolina, and surrounding areas. Georgia is in full production with moderate supply, while Florida is expected to begin in 2–3 weeks. In the West, Washington may wrap up within two weeks, weather permitting. Baja leads with light to moderate volume. Light jalapeño crossings from Sonora have begun, Central Mexico remains light to moderate, and California's season may end this week due to rain.

pineapples



Supply remains tight with firm pricing as Costa Rica continues to face weather and logistics challenges, including past port disruptions. Crownless and large fruit are especially limited, with strong demand across major ports. Sporadic storms may continue to affect field and packing conditions through late October. Improvement is possible in November if weather normalizes, but prices are expected to stay elevated through month-end, especially for preferred sizes.

potatoes



The Idaho potato harvest has concluded, and shipments are now transitioning from field to storage. This season's crop is showing notable improvements in both quality and size profile, with larger sizes more readily available compared to last year. Market pricing for 40–70 count potatoes continues to soften, currently reaching its lowest point since 2016. With supplies remaining abundant, it's an ideal time to promote.



Market UPDATE

squash



Supply has tightened in the East as local programs end. Fall harvests are underway in North Carolina, Georgia, and Florida, with Georgia's volume down due to field abandonment. Supply should improve as new plantings come in and Florida gains momentum. Quality is mixed from weather, but good product remains. In the West, California's season has ended, making Sonora the main source; recent rain caused short-term quality issues, but conditions are expected to improve soon.

tomatoes



RADAR Supplies are tight nationwide as production shifts south. In the East, Tennessee and Virginia are winding down, with Florida's Palmetto/Ruskin crops starting late October and building through mid-November. In the West, California's season is ending due to rain, while Baja and Central Mexico face reduced volumes from cool, wet weather but should improve soon. Quality is mixed for roma and rounds; grape show strong quality, with Florida now leading Eastern supply and Baja/Mexico covering the West until Sinaloa begins in December.

commodities alert overview

The annual transition from Salinas to Arizona is anticipated in November and may affect availability of Green Leaf, Iceberg, Romaine, Romaine Hearts, Processed Salads, and Baby Leaf items like Spring Mix, Baby Arugula, and Baby Spinach. As the shift begins, some supply challenges might be expected throughout the month.

Heavy rain and hail have severely impacted supply and quality across key items in the Salinas Valley and surrounding regions. **Strawberries, broccoli, broccolini, brussels sprouts, cauliflower, and iceberg** are all facing extreme shortages, with fragile product, insect pressure, and inconsistent sizing. Most items will remain tight through early to late November, with only modest relief expected as production transitions to Yuma.





Market UPDATE

in the news...

La Niña Watch Is On — Here's How It Could Shake Up Drought and Winter Weather

The Climate Prediction Center says there's a 71% chance of La Niña conditions developing from October through December, while also issuing a La Niña Watch. However, one meteorologist expects La Niña to make a quick exit.

Tyne Morgan | October 20, 2025 | thepacker.com

What Farmers across the U.S. are gearing up for a potentially volatile winter as the National Weather Service has placed the country under a La Niña Watch. But what does that really mean for the months ahead? Eric Snodgrass, principal atmospheric scientist for Nutrien Ag Solutions, says this winter's pattern could be one to watch closely.

Weather Highlights from Now Through December

- Expect an early-peaking La Niña, with the strongest impacts likely around Christmas.
- Look for cold, snowy conditions in the north and dryness in the south.
- Watch for frequent Arctic intrusions and an active Ohio Valley storm track.
- Recharging soil moisture before freeze-up is critical, especially in the Midwest.
- Persistent Cotton Belt drought could influence next summer's Corn Belt outlook.
- South America faces a wetter north/drier south split, which could affect global crop markets.

What a La Niña Watch Means

The Climate Prediction Center says there's a 71% chance of La Niña conditions developing from October

through December. CPC also issued a La Niña Watch, which means conditions are favorable for the development of La Niña within the next six months.

"La Niña just means the trade winds are fast across the equator," Snodgrass explains. "When that happens, it tends to give us a very loopy jet stream throughout winter."

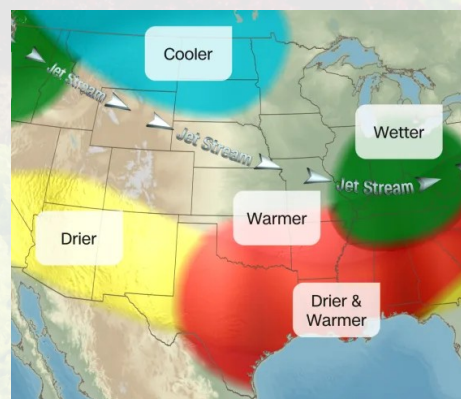
That looping pattern is something Snodgrass says influences everything from temperature swings to precipitation.

"When you think about La Niña winters, they all have different flavors," he says. "We've had four La Niñas in the last five winters. This would be the sixth one in that time frame. And the big question we have is: Is it going to deliver typical La Niña conditions?"

Historically, La Niña brings colder and snowier conditions across the northern U.S. and drier conditions in the South.

"We typically find that we're dry from the Southwest, the Sun Belt to the Cotton Belt," Snodgrass says. "We tend to be snowier and colder to the north — across parts of the Pacific Northwest, Northern Plains, Midwest and Great Lakes. La Niña winters tend to be cold, tend to snow, but that's not a guarantee — it's a tendency."

Early Peak, Quick Exit



(Graphic from CNN Weather)

This year's La Niña is expected to be relatively short-lived.

"We think it's going to peak early, probably right around Christmas, and probably quickly exit," Snodgrass notes. "The big question I have is: What's going to happen to the drought monitor between now and next April when we're thinking about a La Niña winter?"

Moisture Deficits Are a Big Concern

Moisture is already top of mind for many growers. After an unexpectedly wet spring in some regions, conditions turned dry quickly, leaving soil moisture depleted.

"We need to get a lot of moisture..."

[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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Market UPDATE

Leaf Transition Schedules - Fall 2025

Grower / Shipper	Current Location	Transitioning	Commodity	Transition Dates
Bengard Ranches	Salinas, CA	Yuma, Az	Broccoli Crowns	12/01/25
Bengard Ranches	Salinas, CA	Yuma, Az	Cauliflower	12/01/25
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Iceberg	11/17/25
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/17/25
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Romaine	11/17/25
Bengard Ranches	Salinas, CA	Oxnard, Ca	Celery	12/01/25
Church Brothers	Salinas, CA	Yuma, Az	Broccoli Crowns	11/13/25
Church Brothers	Salinas, CA	Yuma, Az	Cauliflower	11/13/25
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Iceberg	11/10/25
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/17/25
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Romaine	11/08/25
Church Brothers	Salinas, CA	Yuma, Az	Celery	11/17/25
Church Brothers	Salinas, CA	Yuma, Az	Value Added / Processing Plant	11/17/25
Field Fresh Farms	Watsonville, CA	Yuma, Az	Broccoli Crowns	11/10/25
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Iceberg	11/10/25
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/10/25
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Romaine	11/10/25
Field Fresh Farms	Watsonville, CA	Yuma, Az	Value Added / Processing Plant	11/10/25
Green Gate Fresh	Salinas, CA	Yuma, Az	Value Added / Processing Plant	11/10/25
Mann Packing Co.	Gonzales, CA	Yuma, Az	Broccoli Crowns	11/10/25
Mann Packing Co.	Gonzales, CA	Yuma, Az	Cauliflower	11/10/25
Mann Packing Co.	Gonzales, CA	Yuma, Az	Lettuce Iceberg	11/10/25
Mann Packing Co.	Gonzales, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/10/25
Mann Packing Co.	Gonzales, CA	Yuma, Az	Lettuce Romaine	11/10/25
Mann Packing Co.	Gonzales, CA	Yuma, Az	Celery	11/10/25
Mann Packing Co.	Gonzales, CA	Yuma, Az	Value Added	11/10/25
River Fresh Farms	Salinas, CA	Yuma, Az	Broccoli Crowns	11/10/25
River Fresh Farms	Salinas, CA	Yuma, Az	Cauliflower	11/10/25
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Iceberg	11/10/25
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/10/25
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Romaine	11/10/25
River Fresh Farms	Salinas, CA	Oxnard, Ca	Celery	12/01/25
River Fresh Farms	Salinas, CA	Yuma, Az	Tender Leaf/Value Added	11/10/25
Taylor Farms - CA	Salinas, CA	Yuma, Az	Value Added / Processing Plant	11/17/25
The Salad Farm	Hollister, CA	Yuma, Az	Value Added / Processing Plant	11/10/25

Huron, Ca. - 10/16 - 11/14/2025

Oxnard, Ca. - 10/08 - 11/17/2025

Oxnard, Ca. - 10/06 - 11/17/2025

Oxnard, Ca. - 12/01 - 06/15/2026

Huron, Ca. - 10/16 - 11/10/2025

Huron, Ca. - 10/16 - 11/10/2025

Oxnard, Ca. - 12/01/2025

*** Dates are tentative and are subject to change ***

Transition Video Links

[Church Brothers](#)

[GreenGate Fresh](#)

[Mann's](#)

[Taylor Farms Foodservice](#)

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