

Market **OUTLOOK**

Week 41: October 6-12, 2025



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Market **ALERT**

**Broccoli
Brussels
Cabbages
Cauliflower
Celery
Green Onions
Lemons
Lettuce
Pineapples**

transportation

Nat'l Diesel Avg: \$3.754 ↑

Last Year: \$3.544 ↑

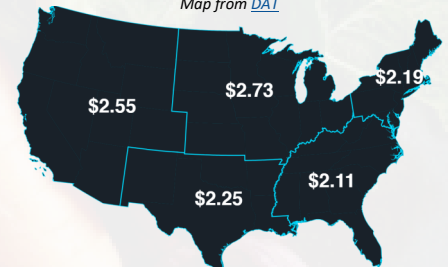
Nat'l Fuel Surcharge: \$0.46

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 and partly cloudy skies with highs in the lower 70s and lows in the 50s and 60s.

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

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

Immokalee, FL: Scattered thunderstorms with highs in the upper 80s and lows in the lower 70s.

Idaho Falls, ID: Mostly sunny with highs in the upper 60s and lows in the 30s.



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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



Mexican supply remains limited following Tropical Storm Mario, with Northern Baja winding down and Sonora ramping up. Peru has good quality, but vessel delays are limiting U.S. availability. Spot volumes are tight and below expectations.

avocados



Mexico is harvesting Flor Loca and Aventajada. Both have similar dry matter. Recent rains are helping fruit size.

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



Supply and demand are steady. Market shows consistent availability and pricing with limited issues.

berries



Blackberries: Late-season crop is strong. Mexico weather limits larger packs, but 6 oz formats are steady. Improvement is expected soon, with solid volume through year-end.

Blueberries: Domestic season is winding down, and imports are currently sold out. Supply should pick up next week, with strong volume expected in three weeks.

Raspberries: Watsonville season is winding down. Warm nights and humidity are causing softness and pest issues (SWD).

Strawberries: Weather damage has reduced supplies. Rain and humidity caused decay, high discard rates, and diversion to processing. Some damaged fruit still reaches cartons. Tight availability is expected through early next week.

broccoli



Broccoli: **EXTREME** Supplies remain tight due to Diamondback moth pressure and weather-related crop stress. Quality is below average, and Mexican products face ongoing issues. Strong demand is driving firm markets, with limited availability expected for several weeks.

Brocolini: **EXTREME** Very limited supply and below-average quality. Plants are flowering due to heat. Shipping from Salinas Valley. Demand and prices are up. Insect pressure and humidity are stressing crops. Expect continued tight supply and high prices.

brussels sprouts



EXTREME Supplies from Salinas and Mexico remain scarce, with fair quality and insect damage. Strong demand is driving firm pricing and continued tight availability.

cabbages



ALERT Supplies are light with fair quality from Central California. Insect pressure and soil disease are occurring due to abnormal weather. Expect tight supplies and high prices in the weeks to come.



Market UPDATE

carrots



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

cauliflower



EXTREME Supplies remain scarce with poor quality from insect pressure and crop stress. Mexican product were also impacted. Strong demand is driving firm markets and limited availability for weeks ahead.

celery



Supplies remain light with fair quality from Salinas and Santa Maria. Market pricing is elevated, with contracts triggered. Expect continued tight supply and firm pricing.

citrus



Limes: Supply and quality are steady. Small sizes are tighter, and pricing remains firm.

Lemons: **ALERT** Supply remains tight in Mexico, Argentina, and Chile. Sizing is challenging. Broadening size specs is advised.

Oranges: California Navels are starting with early picks showing light color and small sizes. The market remains stable with steady supply and demand.

cucumbers



Eastern supply is strong, with New York and Michigan wrapping up in 7–10 days as focus shifts south. In the West, Baja leads on quality; Sonora remains light but should improve as Mainland Mexico begins in mid-October.

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 from Colombia and Mexico, though heat has affected quality. Tarragon is back to normal. Chervil imports from Ecuador are slowing due to weather.

Cilantro: **ALERT** Supplies are light with fair quality. Shipping from Oxnard and Salinas. Strong demand and limited availability are driving prices up. Expect elevated pricing.

kale



Supply and demand are steady, with fair quality reported. Shipments are from Salinas. Market pricing remains stable.

lettuce



Green & Red Leaf: **RADAR** Light supply from Salinas. Fair quality due to insect pressure from warm, wet weather. Demand is steady with prices rising. Expect fair quality and firm markets.

Iceberg: **EXTREME** Supply remains very light with low yields from INSV. Salinas and Santa Maria are shipping fair quality with light weights and smaller heads. Strong demand is driving tight supply and firm markets.

Romaine: **ALERT** Supply remains light with low yields from INSV. Salinas and Santa Maria are shipping fair quality with insect damage, wind burn, and mildew. Carton weights are light, and market conditions are firm.



Market UPDATE

lettuce cont..



Tender Leaf: Steady supplies and demand. Fair quality due to heat and scattered showers causing soil disease and mildew. Pricing is steady.

melons



Cantaloupe: Dos Palos is in peak production with high sugar and strong flavor. Market sizing is shifting to 9ct and 12Js; 12s remain limited. Quality is consistently high.

Honeydew: Dos Palos fruit is trending larger, mostly packed as 6Js. Internal quality is excellent, with consistent brix, smooth exteriors, and strong supply driving 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. A brief gap in availability is likely early to mid-October as Idaho transitions to a cured storage crop, typically lasting 1-2 weeks.

onions green



RADAR Light supply from Mexico with fair quality. Heat damage affecting product. Expect very limited supply and high prices.

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 a 27% decline in value may tighten supply and firm prices—especially for early-season Bartlett and Anjou.

peppers bell



Central Mexico supply is strong but may ease slightly. Eastern Canada shows smaller sizes and quality concerns. Western Canada maintains good quality, with harvest expected through October, weather permitting.

peppers chili



Eastern supply is tight, with Georgia expected to start soon. Key varieties remain short in the West. Baja, California and Central Mexico are steady, and Mexico starts mid-October. Tomatillo quality is down from rain, with improvement expected in two weeks.

pineapples



Availability has tightened, especially for larger sizes, due to reduced Costa Rica yields. Smaller sizes are also constrained as demand outpaces supply. Internal quality is strong, but weather-driven variability persists.

potatoes



Acreage is steady, with ideal summer weather supporting a strong size profile. Larger counts are more available than last season. Pricing remains stable, and demand is consistent.



Market UPDATE

squash



Eastern squash volumes are strong, with North Carolina and Georgia producing good quality. Cooler temps may slow output soon. Western supply continues from California. Sonora has started with light yellow squash and fair zucchini quality, expected to improve.

tomatoes



Roma and round supply is steady in the East, with strong quality from Alabama, Tennessee, and Canada. Cooler temps may slow volume. North Florida and Ruskin/Palmetto start soon. In the West, California and Mexico remain consistent. Grape is active; Virginia is winding down as Ruskin/Palmetto ramps up. TOV is light from Canada but improving in Mexico.





Market UPDATE

in the news...

Florida tomato industry ripens as anti-dumping duties return

Carla Espinoza Gutiérrez | October 2, 2025 | freshfruitportal.com

After 28 years under the Tomato Suspension Agreement (TSA), US growers are officially able to profit from what they say is now a level playing field.

With reinstated anti-dumping duties for Mexican growers, Florida Tomato Exchange (FTE) Executive Vice President Robert Guenther tells FreshFruitPortal.com the Sunshine State's industry is gearing up for a good season.

"Stronger domestic production means a more resilient supply chain," he explains. "By keeping American growers competitive, we reduce dependence on imports and avoid the risk of sudden shortages or spikes."

The FTE has long deemed trade protections provided by the TSA insufficient, and openly supported the US Department of Commerce's decision to scrap the deal.

With the state's marketing season beginning later this month, Guenther emphasizes that stable prices and consistent supply remain the sector's top priorities. Domestic producers lost a significant market share to Mexican supplies in the past decades, as the neighboring country saw almost 250 percent growth.

"For decades, Mexican producers sold tomatoes below fair value, driving US growers out of business," he says. "This

duty simply restores a level playing field."

According to the USDA's 2024 Vegetable Summary, the fruit is consistently among the top-selling vegetables in the US produce department. Guenther notes that domestic growers are now better positioned to plan, invest, and expand without the competitive threat of dumped imports.

"Tomatoes remain one of the most affordable, nutritious, and stable vegetables in the produce aisle," he adds. "The numbers tell the story. Prices have moved less than analysts predicted and remain affordable."

Enforcement and risk management are now in focus

With the TSA no longer in effect comes the issue of enforcement. For this, Guenther says, the role of federal agencies such as Customs and Border Protection (CBP) will be crucial.

"Failure to declare the correct value of the merchandise, to identify the correct country of origin, the correct exporter or manufacturer, or to pay the pertinent cash deposits can result in penalties imposed by CBP," Guenther stresses. "In certain circumstances, the penalties can be criminal".

The FTE is advising its members



to closely monitor both market conditions and compliance developments. While potential disruptors remain a concern, the organization projects a positive outlook for the season.

"Input cost continues to be an issue as with many other fresh produce items," Guenther explains. "Weather can also impact the market for Florida tomatoes, given hurricane season and a cold snap that can occur in the growing regions."

Despite this, Guenther says that shoppers shouldn't be worried about price surges. A strengthened national tomato industry, he adds...

[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