

Market **OUTLOOK**

Week 47: November 17-23, 2025



Market ALERT

Beans
Berries
Broccolini
Brussels
Cauliflower
Celery
Lettuce
Melons
Mushrooms
Peppers Chili

transportation

Nat'l Diesel Avg: \$3.837 **↑**

Last Year: \$3.521 **↑**

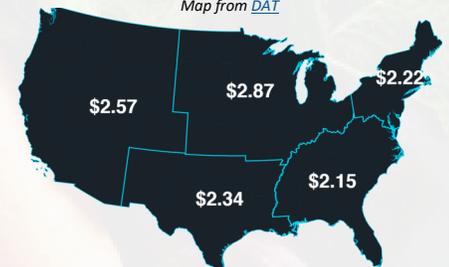
Nat'l Fuel Surcharge: \$0.46

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 skies with some showers with highs in the 60s and lows in the 50s.

Salinas, CA: Partly cloudy skies with some showers with highs in the 50s and 60s and lows in the 40s.

Yuma, AZ: Partly cloudy with some sunny skies with highs in the 60s and 70s and lows in the 50s.

Immokalee, FL: Mostly sunny skies with highs in the 80s and lows in the 50s and 60s.

Idaho Falls, ID: Mostly cloudy skies with some showers with highs in the 30s and 40s and lows in the 20s.



Market UPDATE

apples



Washington's 2025 crop is projected to reach 142 million 40 lb 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 tight but is gradually improving. Hermosillo, Mexico is seeing better availability in smaller sizes, while larger sizes are still limited. Peru's volume and sizing are steadily increasing. Market activity is slower due to more standard-size product from Mexico.

avocados



Last week's volume dipped slightly, closing at 57.4 million lbs, marking a modest step down. However, the supply chain has recovered from prior crossing delays, and movement has normalized. Mexico continues to hold strong volume, with no major constraints reported. The size curve is trending upward and expected to improve steadily week-over-week, supporting consistent availability and market stability.

bananas



Supply remains steady from key origins like Ecuador, with consistent shipping volumes typical for this time of year. Pricing remains firm, driven by strong demand and origin cost structures. Over the next 2–6 weeks, market conditions should stay stable with quality meeting expectations. However, unexpected weather or transport issues could create slight upward pressure, though overall availability remains healthy.

beans



Green Beans: **RADAR** Georgia production has ended early due to cooler weather. Florida has just begun light harvests and is expected to increase production around the holiday, though recent cold fronts may pose challenges and market are expected to escalate. In the West, Baja offers the best quality amid lighter volumes, Sonora and Central Mexico remain limited, and Sinaloa will add supply by late November to stabilize the market.

Snow Peas: **ALERT** Guatemalan supply remains scarce due to weather, with recovery expected mid-November. Peruvian volumes are seasonally low, and domestic availability is limited. Prices stay elevated as Mexican production begins but falls short of strong demand.

berries



Blackberries: Supplies are slow due to recent rains in Mexico, but if conditions stay dry, harvest volumes should improve. Availability is expected to strengthen and remain strong through November. Some soft fruit and red cell/color reversion are occurring due to recent heat, rain, and humidity.

Blueberries: **ALERT** Availability has improved after earlier delays and is expected to remain strong through Thanksgiving. Mexico's production is slowly ramping up with limited volumes through Texas, but supplies should continue to strengthen in the coming weeks.

Raspberries: **ALERT** Southern California supplies remain very limited through December, while Southern and Baja Mexico provide fair but weather-affected quality, with some soft or overripe fruit. Volumes from Mexico are expected to increase in the coming weeks, helping to ease current shortages.



Market UPDATE

berries cont...



Strawberries: **EXTREME** California's Santa Maria and Oxnard regions are forecasted to receive over 5" of rain in the next 5 days, halting production through mid-week and possibly 7–10 days pending quality checks; this will cause harvest delays, reductions, or cancellations, impacting loading schedules, pack styles, labels, and potentially leading to substitutions. Central Mexico's output is increasing but is insufficient to offset California's decline or meet demand, though quality is strong with some smaller sizing. Florida has begun very light production, with regular harvests and meaningful volume expected by the second week of December.

broccoli



Broccoli: Supplies have improved, with crews actively managing past quality issues such as pin rot, brown bead, diamondback moth damage, and mechanical defects. Demand has softened, leading to lower market pricing. Over the coming weeks, volumes are expected to stay on budget and meet program needs. A transition to Yuma in mid-November should improve quality and maintain moderate supply levels.

Brocolini: **EXTREME** Supplies remain tight, with overall quality reported as fair due to earlier insect pressure and weather-related plant stress impacting consistency and yields. Shipments are currently coming from the Salinas Valley, where demand has increased, driving market prices higher. These conditions are expected to persist, with elevated pricing and limited availability likely until the transition to Yuma.

brussels sprouts



EXTREME Supplies remain in short supply in the Salinas Valley, with earlier unpredictable weather

impacting yields and slowing field recovery. Quality is challenged by uneven sizing and weather-related stress, though crews are working to maintain clean, consistent packs. Availability will stay tight over the next 1–2 weeks, with only gradual improvement expected. Supplies are likely to remain below normal until the growing region transitions.

cabbages



Supplies have strengthened this week, with growers reporting improved availability. Continued gains in market stability and quality are expected as the transition to Yuma is finalized in mid-November.

carrots



Harvest conditions are improving with cooler weather, leading to better sizing and improved pack-outs. New-crop volumes are steadily increasing. Jumbo sizes remain tighter than medium, though availability is gradually balancing as more fields come online. Markets should stay mostly steady over the next 2–6 weeks, with a slight chance of softness as supply builds. Weather remains a key variable that could briefly disrupt packing or tighten availability.

cauliflower



Supplies remain light in the Salinas Valley, the primary growing region at present. Inconsistent heads and discoloration are common, with quality impacted by insects, soft rot, mildew, and other defects. Crews are actively managing these issues to maintain appearance. While a slight uptick in supply is possible, volumes will largely support program business over the next 1–2 weeks. Availability is expected to stay below normal until the transition to Yuma begins next week.



Market UPDATE

celery



Supplies are light in Salinas, and markets have increased. Quality is strong with good case weights, though crews monitor for pith and fusarium. Supplies should remain moderate as the season winds down, with Oxnard and Yuma starting in December. Expect tight availability and higher retail demand through Thanksgiving.

citrus



Limes: Mexico remains the primary source of supply, with consistent harvests and strong quality. Colombian arrivals are expected shortly, beginning with smaller sizes and transitioning to larger fruit. This will support balanced supply and stable pricing.

Lemons: Harvest is active in District 2, with peak volumes in the 140s and 115s, while smaller sizes remain tight. District 3, now underway, is expected to bolster supply for smaller fruit and is showing excellent quality with heavy Fancy grade. District 1, focused on exports, continues to yield larger sizes and clean pack-outs. Domestic supply is tight, and early offshore import conclusions have limited support for small fruit demand. Spec flexibility is advised for foodservice programs.

Oranges: California navel oranges is cautiously optimistic: warm, dry conditions are expected to promote strong fruit color and favorable harvest timing, though brief interruptions in fieldwork may occur due to intermittent rain forecasted around November 16th and 20th.

cucumbers



Supplies are mainly from Georgia, with Florida starting light harvests; cooler weather may briefly impact Georgia. Florida volumes will build in coming weeks, and Honduras imports start mid-

December with reduced acreage. In the West, Baja winds down as Sonora and Sinaloa ramp up, strengthening supply ahead.

grapes



California's crop remains strong, but green varieties are under pressure as supply winds down. A 1–2-week gap is likely due to delayed Peruvian arrivals, which may cause firmer pricing into early December. Red varieties are expected to remain stable. Import timing will be key—any further delays could deepen the gap and price impact.

herbs



Basil and chervil remain stable in both supply and quality. Cooler California temperatures may slow growth slightly, but no meaningful market impact is anticipated.

Cilantro: Supplies have improved with good quality and steady demand. Product is shipping from Oxnard and Salinas. Market pricing has eased and is expected to remain stable alongside consistent supply over the next few weeks.

kale



Supplies are steady with fair quality, and demand remains strong. Product is shipping from Salinas and Oxnard, with market pricing being stable. Conditions are expected to hold through the next coming weeks.

lettuce



Green & Red Leaf: ALERT Supplies remain critically low in the Salinas Valley due to prior storm damage and disease pressure. Medium sized products with below-normal case weights are common, and heavy trimming continues to reduce yields. Conditions are expected to stay



Market UPDATE

lettuce cont...



poor until production shifts to Yuma in mid-November.

Iceberg: EXTREME Supplies are critically low in Salinas and Huron due to severe weather damage, including hailstorms. Heads are medium-sized with light case weights of 36–38 lbs. Fields remain stressed, and crews are attempting to mitigate bottom rot, rib blight, mildew, insect activity, soil disease, and INSV, requiring heavy trimming that reduces yield. Supplies will stay very tight and unstable until production shifts to Yuma in mid-November.

Romaine: EXTREME Supplies are critically low in the Salinas Valley due to severe weather and disease pressure. Hail and heavy 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. Hearts are in critically low supply, with heavy field losses. Heads are medium-sized, weighing 18–22 lbs. per case.

Tender Leaf: ALERT Supplies remain very limited due to severe weather, including last week's hailstorm, which significantly reduced yields. Crews are managing mildew and soil disease, but availability will stay tight until the full transition to Yuma in mid-November.

melons



Cantaloupe: Yuma yields are well below expectations, and the season will end 7–10 days early. Supply is tight, mostly 9/9J sizes with some increase in 12-counts. Internal quality remains strong. Expect firm pricing and limited availability

for the next 2–3 weeks.

Honeydew: Domestic supply is extremely limited. Mexican imports are increasing but mostly large sizes (5/5Js) with cosmetic issues like mud and scarring. Market will stay tight with firm pricing and inconsistent appearance until import volumes improve.

mushrooms



White and brown supplies remain very limited amid increased 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 early November.

onions



Shippers have moved to storage crops with strong supply and consistent quality across all sizes and colors. Market prices are stable, though yellow jumbo, medium, and super has seen a slight increase due to steady demand. Supply currently exceeds demand, but market conditions are expected to balance as the season advances.

onions green



Supplies from Mexico are steady, with mostly medium-sized. Weather stress has eased, and overall quality is good with only minor cosmetic issues. Supplies should gradually improve over the next couple of weeks and return to normal if conditions remain stable.

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



Market UPDATE

pears cont...



the crop could exceed 400,000 tons, returning to pre-2022 levels, thanks to favorable spring weather and improved orchard management.

peppers bell



Supplies remain light to moderate. Canadian shipments continue for about two more weeks, though sizing is trending smaller with some retail still available. Production has shifted to Mexico, led by Jalisco, where volumes are steady and quality strong with good color and firmness. Availability should hold until Western Mainland Mexico begins harvesting in the coming weeks, which will help boost supply.

peppers chili



RADAR Georgia remains the main Eastern source, with Florida now harvesting in Plant City and Immokalee. Florida currently lacks serrano, poblanos, and habaneros, but these should start within two weeks; quality is good. Cold weather in Georgia may tighten short-term availability. In the West, supplies are steady but transitioning as Baja winds down and Sonora and Sinaloa ramp up over the next 7–10 days. Serrano, anaheim, and tomatillos are light, though Nogales will begin receiving tomatillos and poblanos soon, improving quality and supply. Overall quality is good, except tomatillos, which remain fair due to Central Mexico weather.

pineapples



Quality remains strong with average brix around 14.7, excellent external color, and solid internal condition, though crownless lots are still being closely sampled due to sugar-base variability. The weather is hot with recent heavy rain, but

logistics are currently stable. U.S. demand is rising ahead of Thanksgiving. Over the next 2–6 weeks, supply will stay somewhat constrained, and pricing is expected to remain firm with potential upward pressure driven by holiday demand and size/quality premiums.

potatoes



The Idaho potato are now shipping from 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 are stable. Supplies remains abundant, it's an ideal time to promote.

squash



Volumes are adequate East and West. Georgia leads Eastern supply with added volumes from Plant City and South Florida; quality is mostly good. In the West, Sonora offers solid volumes with improving quality, and favorable conditions should keep supplies steady in the weeks ahead.

tomatoes



Roma volumes remain light in the East as Tennessee and Virginia finish and Florida begins early harvests. Crops show strong quality and XL sizing, with volumes expected to normalize in 10–14 days. Grape supply is moderate, with good quality from Ruskin/Palmetto and Labelle. In the West, Baja and Central Mexico are now the main sources, offering light to moderate supply. Quality varies, and larger sizes are limited in Baja. Availability should improve in 7–10 days, though a seasonal dip is expected post-Thanksgiving until Culiacan ramps up in mid-December.



Market UPDATE

in the news...

Agriculture breathes sigh of relief as end of government shutdown restores critical USDA support

November 13, 2025 | FreshFruitPortal.com

After the US Senate Democrats broke ranks earlier this week, the end of the 43-day government shutdown, the longest ever recorded, was finally in sight.

Yesterday, the House ratified the new funding bill that was voted on in the Senate, and only hours later, President Donald Trump signed it into law in the Oval Office, officially reopening the government.

The bill will extend government funding until the end of January, reinstating resources to the SNAP program, as well as the US Department of Agriculture (USDA), which had stopped providing aid, loans, and other services to farmers as a result of the stoppage.

Agriculture, a shutdown casualty

The agricultural sector in the United States has been hit hard by the country's dynamic trade policies over the past year. The sector has experienced lower margins due to rising production costs across the board.

Increased prices for labor, repairs, fertilizers, and packaging, as well as tariff retaliation from international trading partners, have threatened profitability, making medium- and small-scale agricultural producers more dependent on USDA aid.

The agency re-allocated \$12 billion for tariff relief during the shutdown, which allowed it to resume some farmer aid programs before a deal was reached in



Congress.

For US farmers, the end of the shutdown means the chance to go...

[Read full article HERE](#)

commodities alert overview

The annual transition from Salinas to Yuma 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.

Snow peas and **leafy greens** are critically short due to severe weather, with high prices and limited supply until mid-November. **Strawberries** face major disruptions from California rains, while **blueberries** improve and **raspberries** remain tight. **Melons, mushrooms,** and **specialty vegetables** stay limited, and **chili peppers** are steady but shifting regions.



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	Huron, Ca. - 10/16 - 11/14/2025
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	11/17/25	Oxnard, Ca. - 10/08 - 11/17/2025
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Romaine	11/17/25	Oxnard, Ca. - 10/06 - 11/17/2025
Bengard Ranches	Salinas, CA	Oxnard, Ca	Celery	12/01/25	Oxnard, Ca. - 12/01 - 06/15/2026
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	Huron, Ca. - 10/16 - 11/10/2025
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	Huron, Ca. - 10/16 - 11/10/2025
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	Oxnard, Ca. - 12/01/2025
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	

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

Transition Video Links

[Church Brothers](#)

[GreenGate Fresh](#)

[Mann's](#)

[Taylor Farms Foodservice](#)

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

