

Market OUTLOOK

Week 48: November 24-30, 2025



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Market ALERT

Beans
Berries
Broccoli
Brussels
Cauliflower
Celery
Cucumbers
Green Onions
Lettuce
Melons
Mushrooms
Pepper Chilis
Squash
Tomatoes

transportation

Nat'l Diesel Avg: \$3.868↑

Last Year: \$3.491↑

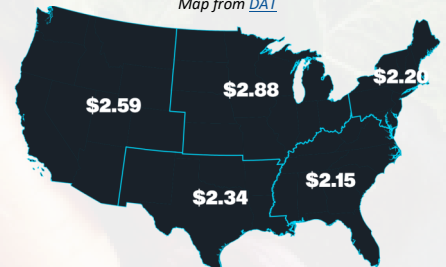
Nat'l Fuel Surcharge: \$0.48

Shortages: Rates are slightly elevated

- extreme - N/A
- slight - AZ & WA

National Posted Rate per mile

previous week's average outbound reefer rate for each region
Map from [DAT](#)



weather OUTLOOK

Oxnard, CA: Partly cloudy and some sunny skies with highs in the 60s and lows in the 50s.

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

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

Immokalee, FL: Mostly sunny skies with highs in the 70s and 80s and lows in the 60s.

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



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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



Mexican production has improved on all sizes. Peruvian volume is increasing in Trujillo, while the region of Ica will soon close fields due to seasonality, shifting size profiles to small and standard. Markets are less active with more standard-size product from both regions.

avocados



Mexico remains the primary source with strong volumes. Last week's slight dip in volume to 57.4M lbs has normalized after crossing delays. Size curve is trending upward, supporting consistent supply 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: Georgia's season ended early due

to cold weather. Florida has begun light harvests, with volumes expected to build around Thanksgiving, though recent cold fronts may impact yields. Western supply is limited; Baja offers the best quality, while Sonora and Central Mexico remain tight. Sinaloa will add supply by late November, helping stabilize the market.

Snow Peas: Guatemalan supply remains low due to weather and will stay limited for two weeks. Peru's season has ended due to seasonality.

berries



Blackberries: Supplies are good with improved quality, though Mexico faced some humidity-related issues. Expect steady supplies and stable pricing over the next few weeks.

Blueberries: **ALERT** Availability improved after last week's delays, and good supplies are expected through Thanksgiving. Mexico's production is slow due to weather, with limited shipments through Texas, but volumes should increase in coming weeks.

Raspberries: **ALERT** Southern California supplies remain limited and will face challenges through December. Mexico continues production in Southern and Baja regions, with fair quality and some soft fruit from recent heat and rain. Supplies from Mexico should increase in the coming weeks to ease shortages.

Strawberries: **EXTREME** California received 4–6 inches of rain over the past four days, with more expected, halting harvest and pushing most orders to next week. No harvest is expected Thursday due to Thanksgiving. Growers may strip plants this weekend and resume limited harvest Friday or Saturday. Mexico's cooler temperatures cut yields by 78%, offering no relief. Quality remains good despite smaller sizing. Florida has started very light production, with significant volume not expected until late December.



Market UPDATE

broccoli



Broccoli: **ALERT** Supplies remain light as Salinas finishes its season. Demand has increased, and limited availability is expected until Yuma begins shipping next week. Quality is reported as good. Market prices increased but should improve as supplies increase.

Broccolini: **EXTREME** Supplies remain limited, and overall quality is only fair. Salinas is finishing its season, with Yuma starting next week. Market prices are expected to stay elevated until volumes improve, which growers anticipate in the coming weeks.

brussels sprouts



EXTREME Supplies remain limited, with quality affected by uneven sizing and weather-related stress. Crews are working diligently to maintain clean and consistent packs. Availability is expected to stay tight over the next 1–2 weeks, as Mexico's production lags. Gradual improvement is anticipated, though supplies will likely remain below normal until the growing region transitions.

cabbages



Supplies are steady with improved availability. Markets and quality should strengthen as the transition to Yuma is completed.

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 tight as Salinas wraps up its season. Yuma production begins next week, bringing improved availability and good quality. Markets are elevated now but expected to ease as supplies increase.

celery



Supplies remain limited as the Salinas season concludes. Oxnard production is set to begin in early December, which should improve availability. Moderate volumes are expected next week, but strong holiday demand through Thanksgiving will keep supplies tight until the transition in December.

citrus



Limes: Mexico continues to be the primary source with strong quality and consistent harvests. Colombian arrivals are expected soon, starting with smaller sizes and shifting to larger fruit, helping balance supply and stabilize pricing.

Lemons: The main growing region is currently peaking at 140, 115, and 165 sizes, with a 70/30 fancy-to-choice ratio.

Oranges: Crop is peaking at 88/113 sizes, with larger sizes becoming more available. Field projections indicate small fruit will tighten after the New Year.

cucumbers



RADAR Supplies remain tight as South Florida production is limited and cold weather slows growth. Honduras, typically the primary winter



Market UPDATE

cucumbers cont...



source, is producing much lower volumes, keeping supplies constrained until Florida's spring crop in March. Demand is shifting to Mexico, where availability is moderate. Baja remains light, while Sinaloa is slow but expected to improve. Overall quality is strong.

grapes



California's crop remains strong, though green varieties are tightening as supplies wind down. A 1–2 week gap is anticipated with delayed Peruvian arrivals, likely keeping pricing firm into early December. Red varieties are expected to hold steady. Import timing will be critical—any further delays could widen the supply gap and intensify price pressure.

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 are steady with good quality and strong demand. Shipments are coming from Oxnard and Salinas. Market pricing has eased, with expectation for a good supply and steady pricing in the weeks ahead.

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 remain consistent over the next several weeks.

lettuce



Green & Red Leaf: ALERT Supplies remain limited as growers transition from Salinas to Yuma. Quality has improved, with sizing and weights expected to strengthen in the coming weeks. Market pricing is elevated, supplies and quality will continue improving over the next few weeks.

Iceberg: EXTREME Supplies remain very limited as growers transition from Salinas to Yuma. Quality and weights are expected to improve over the next few weeks. Market pricing is elevated, with contracts triggering caps, but supplies, quality, and markets are projected to gradually improve in the weeks ahead.

Romaine: EXTREME Supplies remain very limited as grower transition from Salinas to Yuma. Quality and weights are expected to improve in the coming weeks. Market pricing will remain elevated, but both supplies and markets are expected to gradually improve.

Tender Leaf: ALERT Supplies remain light as growers transition operations and processing plants to Yuma. Market pricing is currently elevated, though both quality and supplies are expected to improve in the weeks ahead.

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 most of the volume consists of 5/5Js with cosmetic concerns such as mud and scarring. The market is expected to remain tight, with firm pricing and inconsistent appearance, until import volumes improve.



Market UPDATE

mushrooms



White and brown mushroom supplies are very limited as demand surges. Quality is fair, with growers battling gnat infestations. With many insecticides no longer effective or approved, colder weather is expected to help reduce pest pressure. Supply challenges are expected from late November into December.

onions



Shippers have moved to storage crops with strong supply and consistent quality across all sizes and colors. Market prices are steady. Supply currently exceeds demand, but market conditions are expected to balance as the season advances.

onions green



Supplies are limited in the coming weeks as growers report lower yields. This trend is expected to persist, keeping prices elevated amid strong demand. Quality remains fair.

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



Canada's season is ending, shifting all production to Mexico and import programs for winter. Central Mexico is the main region with light to moderate supply and good quality, though some greening is noted. Western Mexico will start

harvesting in 2–3 weeks and become the primary source, improving availability and stabilizing supply.

peppers chili



RADAR Eastern supplies are moderate as Georgia nears season end and production shifts to Florida, where most varieties are available and quality is strong. In the West, volumes are light due to earlier weather delays, with Central Mexico offering the best mix. Supplies remain tight, especially on Anaheim, serrano, and poblanos, but should improve in 7–10 days as more growers start. Overall quality is good, though tomatillos still show some issues.

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



Idaho russets are now shipping from storage, with this season's crop showing clear improvements in both quality and size profile. Larger sizes are more readily available compared to last year. Market pricing remains stable, and supplies are abundant—making it an ideal time to promote.



Market UPDATE

squash



ALERT Supplies are extremely limited in both regions after cold weather ended Georgia's season and reduced Florida yields. Relief is expected as Homestead and Immokalee begin harvesting. In the West, Sonora is the primary source, with Sinaloa set to start soon. Zucchini supplies are tight but showing slight improvement. Overall quality remains good.

tomatoes



RADAR Florida roma supplies are very limited

due to cool weather, with Palmetto/Ruskin nearly finished and Labelle starting lightly next week. Tight availability is expected to continue for 3–4 weeks. In the West, roma volumes remain short following Baja rain and slow Mexico transition, though improvement is anticipated by mid-December; with Sayula offering the best quality. Round tomatoes are adequate in the East with good quality, while the West stays light until Culiacán harvest begins in mid- to late December. Grape are plentiful in the East, while Mexico remains lighter but should improve next week and will increase when Sinaloa begins mid-December.

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.

Produce supplies are tight from weather and seasonal shifts, with extreme shortages in **strawberries**, **broccolini**, **Brussels sprouts**, **iceberg**, and **romaine**. **Green beans**, **broccoli**, **cauliflower**, **celery**, and **tender leaf** remain limited, while **berries**, **melons**, **mushrooms**, **cucumbers**, **squash**, and **tomatoes** face ongoing constraints. Prices are high, and gradual recovery is expected through December.



Market UPDATE

in the news...

Agriculture Trump rolls back tariffs on dozens of food products

Danielle Kaye & Nardine Saad | November 15, 2025 | [BBC.com](#)

US President Donald Trump has signed an executive order allowing a range of food products, including coffee, bananas and beef, to escape his sweeping tariffs.

The move comes as his administration faces mounting pressure over rising prices. While Trump previously downplayed concerns about the cost of living, he has focused on the issue since his Republican Party's poor performance in last week's elections.

The dozens of products included on the White House's list of exemptions range from avocados and tomatoes to coconuts and mangoes.

These goods, the Trump administration said on Friday, cannot be produced in sufficient quantities domestically.

Trump has long said that his tariffs - currently a baseline 10% on imports from all countries, with additional levies on many trading partners - would not lead to increased prices for US consumers. He also said affordability was a "new word" and a "con job" by Democrats.

He has argued the taxes are necessary to reduce the US trade deficit - the gap between the value of goods it buys from other countries and those it sells to them. Trump has said the US has been exploited by "cheaters" and "pillaged" by foreigners, adding that higher levies would encourage those in the US to buy American goods instead.

But grocery costs and the soaring price of beef has become a political issue for



Trump. Last week, he called for an investigation into the meat-packing industry, accusing companies of "Illicit Collusion, Price Fixing, and Price...

[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

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

Transition Video Links

[Church Brothers](#)

[GreenGate Fresh](#)

[Mann's](#)

[Taylor Farms Foodservice](#)

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