

# Market **OUTLOOK**

Week 46: November 10-16, 2025



**Market ALERT**

- Beans
- Berries
- Broccoli
- Brussels
- Cabbages
- Cauliflower
- Celery
- Lettuce
- Melons
- Mushrooms
- Peppers Chili
- Squash
- Tomatoes

## transportation

Nat'l Diesel Avg: \$3.753 **↑**

Last Year: \$3.536 **↑**

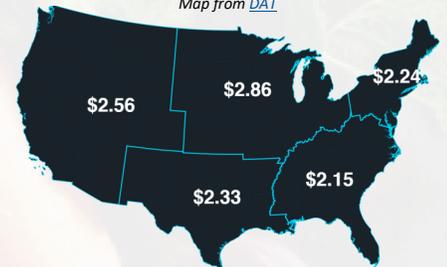
Nat'l Fuel Surcharge: \$0.46

Shortages: Rates are flat

- extreme - N/A
- slight - 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 skies with some showers with highs in the 60s and 70s and lows in the 50s.

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

**Yuma, AZ:** Partly cloudy with some sunny skies with highs in the 70s and 80s and lows in the 50s and 60s.

**Immokalee, FL:** Partly cloudy with some sunny skies with highs in the 70s and 80s and lows in the 40s and 50s.

**Idaho Falls, ID:** Mostly cloudy skies with highs in the 50s and lows in the 20s and 30s.



# 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:** Eastern supply is strong, led by Georgia for Thanksgiving demand, while North Carolina and Virginia taper off. Florida has begun light harvests, with more production expected around the holiday. In the West, Baja offers the best quality amid lighter volumes from Sonora and Central Mexico due to weather issues. Sinaloa will increase supply from starting late November.

**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 dipped slightly from recent rain but should rebound with continued dry weather. Availability remains strong through November, supported by higher-elevation varieties. Some softness and color reversion persist due to recent heat and humidity.

**Blueberries:** **ALERT** Availability has improved following last week's delays, with good supplies expected through Thanksgiving. Mexico's production is ramping up slowly due to weather-related issues, and shipments through Texas remain limited. Supplies from the region should continue to improve in the coming weeks.

**Raspberries:** **ALERT** Supplies remain very limited in Southern California and are expected to face continued challenges through December. Production in Southern and Baja Mexico is ongoing, with fair quality overall. Some softness and overripeness are occurring due to recent heat, rain, and humidity. Increased volume from Mexico in the coming weeks should help ease current shortages.



# Market UPDATE

## berries cont...



**Strawberries:** **EXTREME** Supply remains tight, with demand exceeding supplies across key growing regions. California production continues in Oxnard and Santa Maria with strong fruit quality—full color, consistent shape, and mid-to-upper 20s count per 1 lb clamshell. However, sizing is trending smaller, and upcoming rain may disrupt harvests. Mexico’s production is increasing but not enough to offset California’s decline, with humidity affecting consistency. Mexican supply will stay limited through November. To manage disruptions, suppliers are harvesting early and encouraging early order placement, especially for West Coast customers.

## 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 bring further quality improvements and maintain moderate supply.

**Broccolini:** **EXTREME** Supplies remain tight, with fair quality due to prior insect pressure and weather-driven plant stress affecting 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 in mid- to late November.

## 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 from the Salinas Valley remain variable due to shifting weather and field conditions. Most product is medium-sized, with crews managing insect pressure and trimming to maintain uniformity. Availability should meet basic needs in the short term, with cooler weather expected to improve consistency. A more stable supply outlook is anticipated after the mid-November transition to Yuma.

## carrots



Cooler weather is improving harvest conditions, improving sizes and pack-outs. New-crop volumes are rising, with jumbo sizes still tighter but balancing as more fields come online. Markets should stay steady over the next 2–6 weeks, though weather could briefly disrupt packing or tighten supply.

## cauliflower



Supplies remain light in Salinas Valley, with inconsistent heads and discoloration due to insects, rot, and mildew. Crews are managing defects to maintain appearance. A slight supply uptick is possible, but volumes will mainly 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 the Salinas Valley, with markets trending higher. Quality remains strong, featuring larger sizes and acceptable case weights, and crews are monitoring for pith and fusarium. Supplies should be moderate over the next few weeks as the Salinas season winds down. The next harvest regions—Oxnard and Yuma—will begin in December. Availability is expected to stay tight due to rising retail demand ahead of the Thanksgiving holiday.

## 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 is transitioning from Valencia to Navel. Valencia harvest is wrapping up, with a tight supply of smaller sizes and better availability of larger fruit. Navel shipments have begun, showing excellent quality with strong color. Sizing remains small, and promotable volumes are still pending. Full availability is expected by early November, with market conditions tight until then.

## cucumbers



Eastern supply is lighter as North Carolina winds down and Georgia yields dip post-peak, though quality remains solid. Florida has begun limited harvests, with more acreage coming online. Early fruit is average but improving. In the West, Baja leads in volume and quality, with steady supply from Sonora and Central Mexico.

## 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 now 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.



# Market UPDATE

## 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 poor until production shifts to Yuma in mid-November.

**Iceberg: EXTREME** Supplies are critically low in the Salinas Valley, with no short-term relief in sight. Recent hail and weather damage have reduced yields, and fields are stressed by disease and pest pressure. Most heads are medium-sized with light case weights averaging 36–38 lbs. Fields remain under stress, and crews are managing issues like bottom rot, rib blight, mildew, insect activity, soil disease, and INSV. Heavy trimming is reducing usable product. Conditions will stay unstable and availability tight until production transitions to Yuma.

**Romaine: EXTREME** Supplies are critically low in the Salinas Valley 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. 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 recent hail and weather-related damage that sharply reduced yields. Mildew and soil disease continue to challenge production. Availability is not expected to improve until the transition to Yuma in mid-November.

## melons



**Cantaloupe:** Yuma yields are significantly below expectations due to earlier weather and bloom drop, with the fall season projected to end 7–10 days early. Supply remains tight, with sizing skewed toward 9/9J and some 12 ct increasing. Internal quality is solid. Over the next 2–3 weeks, expect constrained supply, firm pricing, and variable appearance until imports ramp up, which will be key to market relief.

**Honeydew:** Domestic honeydew volumes are very limited, while Mexican imports are gradually increasing with large sizing (5/5Js) and ongoing appearance issues like mud and scarring. Yuma yields are significantly below expectations due to earlier weather and bloom drop, with the fall season ending 7–10 days early. Over the next 2–3 weeks, supply will remain tight, pricing firm, and appearance variable until imports fully ramp up—marking the key relief point.

## 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 jbo has seen a slight increase due to steady demand. Supply currently exceeds demand, but market conditions are expected to balance as the season advances.



# Market UPDATE

## onions green



Supplies from Mexico are improving and expected to stay on budget over the next few weeks. Sizing is mostly medium, with some small and large mixed in. Quality is steady with minor cosmetic issues, and availability should gradually increase, returning 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 the crop could exceed 400,000 tons, returning to pre-2022 levels, thanks to favorable spring weather and improved orchard management.

## peppers bell



Eastern supply is solid, led by Georgia's steady volumes and consistent quality, with Florida ramping up harvests. A smooth transition between regions is expected through November. In the West, supply is moving from Oxnard to the California desert, with Coachella growers joining soon. Mexico's limited production will be supplemented by new Sonora and Sinaloa crops starting mid-November.

## peppers chili



**RADAR** Georgia remains the primary source for Eastern chili peppers, with steady availability across varieties despite lighter poblano and serrano volumes. Florida has begun light harvesting in Plant City and South Florida. In the West, Baja, Sinaloa, Sonora, and Central Mexico are active, with moderate jalapeño volume and strong quality. Other varieties are lighter, but

production is expected to increase soon. Tomatillo quality is fair due to weather, though overall supply and selection should improve over the next two weeks.

## 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



**RADAR** Squash supply has shifted to Georgia and Florida following the end of Eastern local programs. Georgia's zucchini volume is tight due to reduced plantings, but Florida is actively harvesting with strong quality. In the West, Sonora leads with moderate yellow squash and limited zucchini, though production is expected to rise soon. Sinaloa's season will begin from late November to early December, supporting the winter transition.



# Market UPDATE

## tomatoes



**RADAR** Roma volumes remain light in the East as Tennessee and Virginia finish and Florida begins early harvests in Ruskin/Palmetto. 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.

### 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.

Heavy rain and hail have severely impacted supply and quality across key items in the Salinas Valley and surrounding regions. **Strawberries, broccolini, brussels sprouts, cauliflower, iceberg, and romaine** 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...*

## America's Thanksgiving Feast Comes with a Side of Waste

According to ReFED, 320 million pounds of Thanksgiving food, which includes 75 million pounds of produce, is headed for the trash bin.

Jill Dutton | November 3, 2025 | [thepacker.com](https://thepacker.com)

Thanksgiving might be a celebration of abundance, but it could also be America's most wasteful day of the year.

A new analysis from NielsenIQ and ReFED estimates that 320 million pounds of food, valued at \$550 million, will end up in landfills this Thanksgiving. At a time when more Americans are facing food insecurity, ReFED says the amount of discarded food is the equivalent of 267 million meals that could have gone to people in need.

Fresh produce accounts for roughly 23% of that total, or about 75 million pounds. For growers, retailers and the broader produce industry, the numbers highlight the need for renewed efforts to educate consumers about meal planning, proper storage and creative ways to use leftovers and reduce waste without sacrificing tradition.

Those leftovers are a key "why" behind the food waste. According to the survey data, more than 90% of Thanksgiving hosts intentionally prepare more food than needed for their holiday gathering. And what does that mean? Leftovers. In fact, the survey shows every single Thanksgiving host surveyed said they have leftover food after their meal.

Thanksgiving leftovers are part of the tradition and festivities, Minnie

Ringland, senior manager of climate and insights for ReFED, says. Many Thanksgiving hosts prepare for leftovers and take actions to help make sure they don't go to waste, including almost half sending guests home with leftover food to eat (45%). They're also making other meals with the leftovers, such as sandwiches and wraps (46%), breakfast or brunch (32%) or new meals like casseroles or soups (31%). Yet the data shows 12% of Thanksgiving hosts — responsible for feeding up to 36 million people — do not plan to manage leftovers in any special way. Making matters worse, nearly half of the hosts surveyed said they are not concerned about food waste around the holiday. And that means there's a good chance those leftovers are destined for disposal, Ringland says.

This year, people's wallets are going to take a big hit from this waste.

"We're seeing general food price inflation, but in particular, USDA reports wholesale prices for frozen turkeys are 40% higher than in 2024, making it likely that what people pay at the grocery store for this Thanksgiving staple will be elevated," Ringland says.

ReFED's analysis indicates 40% of what gets tossed on Thanksgiving is turkey, equating to a lot of wasted dollars and cents.



(Photo: Christina Herrick)

The environmental impacts of this wasted Thanksgiving food are also significant. ReFED says the emissions associated with food that gets wasted on Thanksgiving are 811,726 metric tons of carbon dioxide equivalent, which is about the same as driving 190,000 gasoline-powered vehicles for a year. Of those emissions, 4,800 metric tons of methane alone come from sending that food to landfill, which is similar to what's emitted by powering 28,000 homes' electricity for a year. And about 39 billion gallons of water were used to produce the food that will be wasted this Thanksgiving, enough to fill more than 59,000 Olympic-sized swimming...

[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](mailto: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



# 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](#)

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