

Market OUTLOOK

Week 51: December 15-21, 2025



Market ALERT

Beans
Berries
Brussels
Celery
Cilantro
Cucumbers
Green Onions
Lettuce
Mushrooms
Peppers
Pineapples

transportation

Nat'l Diesel Avg: \$3.665↓

Last Year: \$3.458↑

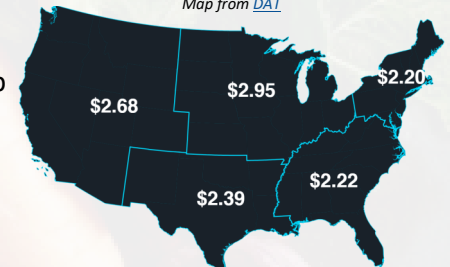
Nat'l Fuel Surcharge: \$0.44

Shortages: Rates are trending up

- extreme - N/A
- slight - TX

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 sun and highs in the 60s and 70s and lows in the 50s.

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

Yuma, AZ: Mostly sunny skies with highs in the upper 70s and lows in the mid 50s.

Immokalee, FL: Partly cloudy skies with some sun with highs in the 70s and 80s and lows in the 50s and 60s.

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



Market UPDATE

apples



Washington State's crop is down 4 million boxes from last year, slowing movement to avoid gaps before new crops. Gala leads foodservice with strong demand and rising prices. Granny Smith shows a 2 million box surplus on paper, but lower pack-outs will shrink that. Red Delicious, though declining, still rivals Gala in foodservice volume. Overall, the state is down 2 million boxes from last season and 4 million from two seasons ago, with export demand lifting prices. Growers continue replacing older orchards with premium varieties like Honeycrisp and Envy.

asparagus



Mexican supplies remain steady with strong volumes anticipated through mid-December, while Peru's season winds down, increasing reliance on Mexico. Demand is moderate as holiday pull begins, though retail promotions are limited. Overall quality is good, with consistent sizing and color, though slight tip softness may appear in older lots.

avocados



US volumes remain stable, with standing inventories effectively managing weekly fluctuations to keep carryover minimal. The industry is actively driving additional holiday promotions. The size curve continues to favor larger fruit, with 48cts holding a dominant share—over 30% of total production. This large-size trend is expected to persist into Q1 2026.

bananas



Supply is ample from key origins, quality remains solid, and logistics are running smoothly. Overall market conditions are stable with no immediate disruptions anticipated.

beans



Green Beans: Production from Mexico is stable, though cooler weather could slightly slow growth; Florida is contributing light volumes. Demand is firm as holiday menus boost usage and foodservice orders trend upward. Quality is generally good, with occasional scarring and size variability reported from early harvests.

Snow Peas: **ALERT** Guatemalan supply remains very low due to weather and is not expected to improve for two weeks. Peruvian production has ended due to seasonality.

berries



Blackberries: Colder weather is reducing yields from Mexico, but growers expect this to be short-term. Forecasts show improving conditions, and supplies should strengthen as weather improves.

Blueberries: Supplies from Peru are declining quickly as the season ends, while Chilean product is still 1–2 weeks away. Markets will tighten as volumes drop. Mexico remains light due to recent cold weather, but growers expect improvement as conditions warm over the next few weeks.

Raspberries: **ALERT** Weather in Central Mexico has reduced volumes, while Baja is experiencing increases due to more favorable conditions. However, Baja's gains will not fully offset the shortfall from Central Mexico, as its crop is only just beginning. Supplies are expected to improve once weather conditions stabilize.

Strawberries: **ALERT** California volumes are light but improving with new Oxnard and better-quality Santa Maria crops. Central Mexico is recovering slowly after cool, wet weather, with stronger growth expected soon. Florida shows the biggest gains, as southern regions avoided northern rains and now have ideal strawberry conditions forecast for the next 7–10 days.



Market UPDATE

broccoli



Broccoli: Supplies continue to improve, with shipping now from Yuma. Demand has eased this week, and supplies are expected to remain steady for the next few weeks. Quality is good, and the 10-day weather forecast is favorable with no rain expected. Market pricing is trending upward, though contracts will not trigger this week. We anticipate this positive trend to continue.

Broccolini: Supplies continue to improve, and demand remains strong. Growers are now shipping from Yuma, AZ, with added volume reported. Supplies are expected to stay steady over the next few weeks.

brussels sprouts



EXTREME Supplies remain extremely limited, with quality only fair. Availability will stay tight for the next few weeks as Mexico lags behind and labor strikes add pressure. Improvement will be slow, and supplies will likely be below normal until the full transition to the new growing region.

cabbages



Supplies have improved as growers report better yields and quality in Yuma, AZ. Demand has eased post-holiday, and quality remains good. Supplies are expected to continue improving in the coming weeks.

carrots



Harvest conditions are favorable, quality is consistent, and supplies are meeting demand without pressure. Sizing and pack-outs continue to perform well, keeping the market steady and reliable.

cauliflower



Supplies continue to improve as shipping transitions to Yuma. Demand has softened this week, but supplies are expected to remain steady in the coming weeks. Quality is good and improving, with a favorable 10-day forecast and no rain expected. Market pricing has strengthened, and we anticipate steady markets and supplies ahead.

celery



Supplies remain very light this week, while demand has increased in recent weeks. Additional regions are expected to start soon, but market pricing will stay elevated until supplies improve out of Yuma. Pricing relief is anticipated as volume builds.

citrus



Limes: Mexican supplies remain steady, though cooler weather may slow sizing; Colombian arrivals are light. Demand is firm, especially for foodservice and holiday beverage programs. Quality is good overall, though occasional blanching may occur in older lots.

Lemons: Steady from the desert region, with Central Valley volumes increasing and fruit peaking on larger sizes. Demand is moderate, with light retail ads but steady foodservice activity. Quality is excellent, featuring smooth rind, strong color, and long shelf life.

Oranges: Navel harvest is in full swing, with sizing favoring larger fruit. Weather has supported strong color and sugar development. Demand is robust for holiday promotions, and internal quality is excellent with high sugars and good juice content.



Market UPDATE

cucumbers



Florida's production is very limited. This will continue until spring crops start in March. With Honduras imports below normal, most supply will come from Mexico over the next few months. Sonora and Sinaloa currently have moderate volumes and good quality, and full seasonal volume is expected in January.

grapes



Import volumes are flowing and helping stabilize the market. The transition from domestic to imported fruit is smoothing availability across regions, with improved consistency, particularly for green varieties. Pricing and supply should remain manageable in the near term.

herbs



Basil remains tight as cooler nights impact yields. Demand is strong particularly parsley and rosemary, and quality is good overall.

Cilantro: ALERT Supplies remain light, with good quality and steady demand. Shipping is now from Oxnard, CA, and Mexico. Market pricing is elevated due to growing transitions and strong demand, and this trend is expected to continue for the next few weeks.

kale



Supplies have improved and should remain steady for the next few weeks. Demand is good, and quality is fair. Shipping is now from Oxnard, CA, and Yuma, AZ. Market pricing is stable.

lettuce



Green & Red Leaf: ALERT Supplies have improved as growers ship from Yuma, AZ. Demand has

eased, and quality, sizing, and weights are better. Market pricing remains elevated but is expected to improve as supplies and quality continue to strengthen in the coming weeks.

Iceberg: ALERT Supplies have improved as growers ship from Yuma, AZ. Demand is lighter, and quality and weights are expected to continue improving. Market pricing remains elevated but should ease as supplies strengthen over the next few weeks.

Romaine: ALERT Supplies have improved as growers ship from Yuma. Demand is lighter, and quality and weights are expected to continue improving. Market pricing will remain elevated into next week but should ease as supplies strengthen over the coming weeks.

Tender Leaf: Supplies have improved as growers and processing plants transition to Yuma. Quality and volume are stronger, and market pricing has returned to normal levels. We expect continued improvement in supplies and stable markets over the next few weeks.

melons



Imports are arriving as expected and beginning to offset earlier domestic tightness. While some sizing and cosmetic variability remains, overall availability is improving. Markets should remain steady as import volumes continue to build.

mushrooms



ALERT Supplies of white and brown mushrooms remain very limited as demand rises. Quality is fair, with growers battling gnat infestations, many insecticides are no longer effective or approved. Cold weather should help reduce pests, but challenges are expected to persist for several weeks. Supply issues will likely continue through December.



Market UPDATE

onions



RADAR Supplies remain strong with consistent quality across the board. Overall market prices are slightly below last year, though reds and whites have shown modest increases. Medium reds and whites are expected to increase further as volumes remain limited. White onions are facing quality challenges and are likely to be tight heading into January, while medium reds are constrained by the predominance of jumbo sizes.

onions green



EXTREME Supplies remain very limited this week due to earlier labor strikes in Mexico, and this trend is expected to continue for several weeks. Demand is rising, keeping market pricing elevated. Quality is only fair, and supplies will likely stay tight with high pricing until conditions improve.

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 Supplies from Central Mexico remain light to moderate, with steady production but some greening issues due to recent cool weather. Output is expected to increase slightly over the next 2–3 weeks before gradually declining from January through March. Small volumes are starting to cross from Western Mainland Mexico, but significant increases and improved color

consistency are anticipated as more growers increase production in late December and early January.

peppers chili



RADAR Eastern supplies are steady with Florida in full season. Strong volumes on poblanos, cubanelles, Hungarian wax, and long hots while jalapeño and serrano remain light. Western supplies are building as Mexico ramps up. Tomatillo and poblano are still light but other varieties are improving. Overall quality is good and availability is expected to strengthen in the coming weeks.

pineapples



RADAR Markets are expected to tighten as growers voice concerns about Q1 2026 supply. Demand remains elevated, and available volumes may fluctuate by region. Import arrivals are consistent, but sizing will vary. Expect firmer markets and the potential for upward pricing pressure.

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.

squash



Florida yellow squash volumes are improving as new fields come online in Southwest Florida and Homestead. Zucchini supplies remain abundant with good quality from most growers. Plant City is still producing but will wind down in the coming weeks. In Mexico, new crops in



Market UPDATE

squash cont...



Sonora and Sinaloa are boosting volumes of both yellow squash and zucchini. Zucchini supply is being monitored closely with current weak market conditions, some growers may abandon fields, potentially tightening availability ahead.

tomatoes



Florida production is steady with strong quality across romas, rounds, and grapes as harvesting continues in Labelle and begins in Naples. Supply should remain consistent barring weather issues. Mexico is transitioning as Baja and Central volumes decline ahead of Culiacán's mid-December ramp-up, which will become the main source. Current quality is fair to good with smaller sizing. Western grape tomato supply is moderate but expected to increase later this month.

commodities alert overview

Berry supplies remain tight from weather impacts in Mexico, though Baja and Florida show improvement; California is gradually rebounding. **Brussels sprouts** and **celery** are extremely limited with high prices. **Cucumbers** are short outside Mexico, with full recovery expected in January. **Cilantro**, **mushrooms**, and **green onions** face severe shortages from transitions and labor issues, keeping costs high. **Lettuce** is improving but still expensive. **Bell peppers** are light with gradual increases expected, while **chili peppers** are strong in the East and improving in the West. **Pineapple** markets remain firm with possible tightening in early 2026.



Market UPDATE

in the news...

\$300 billion in 2025: The key drivers fueling global fresh food e-commerce growth

December 5, 2025 | freshfruitportal.com

The fresh food e-commerce market has seen substantial growth, according to Market Research Intellect.

The firm projects the sector will reach a valuation of \$300 billion in 2025 and double its worth by 2033, with a compound annual growth rate of 8.5%. This expansion is supported by increasing online grocery penetration, rapid development of digital infrastructure, and strong consumer demand for fresh, high-quality products delivered conveniently.

Asia-Pacific leads the market due to its massive population and accelerated smartphone usage, followed by North America and its high demand for premium fresh food, subscription-based grocery services, and innovative fulfillment solutions like micro-warehousing and autonomous delivery.

The market's projection highlights sustained momentum, driven by advanced logistics, wider retailer participation, and continuous improvements in supply chain efficiency.

Digital shift and a choice for fresh: what's driving fresh food e-commerce expansion

The market is undergoing a significant digital transformation as consumers increasingly prefer online platforms for purchasing fruits, vegetables, dairy, meat, and other perishables.

As convenience becomes a cornerstone of modern retail, digital transformation remains a key driver of sustained expansion in the fresh food e-commerce landscape.

Advancements in mobile applications, seamless payment gateways, and user-friendly interfaces have made the buying process more intuitive and accessible, says the firm. Personalization tools, such as AI-driven product recommendations and dynamic pricing models, are also paying off and enhancing customer satisfaction and retention.

Fresh, but also practical

Consumers today are increasingly adopting online grocery shopping for its convenience, time savings, and improved access to high-quality fresh foods, says the market research firm.

The shift in lifestyle, particularly among urban working professionals and nuclear families, has generated strong demand for quick, reliable, and hassle-free delivery services. The emphasis on freshness and quality assurance has further strengthened trust in online platforms, as many retailers now offer farm-to-door supply chains, enabling faster and fresher deliveries.

Another trend is the growth of subscription models and curated food baskets, as they've gained popularity among health-conscious consumers



Courtesy of Amazon

seeking organic produce and sustainable options. Flexible delivery windows, instant refunds, and easy returns enhance the overall shopping experience.

Convenience powered by supply chain innovation

Advanced supply chain solutions are transforming the fresh-food e-commerce market, enabling seamless handling of perishable goods, reads the Market Research Intellect report.

Cold-chain logistics, including temperature-controlled warehouses, refrigerated vehicles, and smart monitoring systems, ensure optimal freshness throughout transit. These advancements are complemented by predictive analytics to forecast demand, reduce waste, and maintain...

[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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