

Market OUTLOOK

Week 52: December 22-28, 2025



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Market ALERT

Berries
Brussels Sprouts
Celery
Cilantro
Green Onions
Lettuce
Mushrooms
Onions
Peppers
Pineapples

transportation

Nat'l Diesel Avg: \$3.607↓

Last Year: \$3.494↑

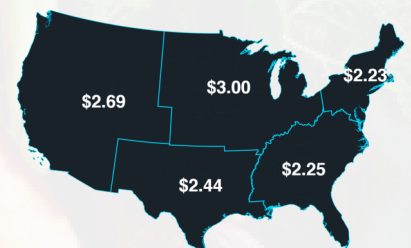
Nat'l Fuel Surcharge: \$0.43

Shortages: Rates are trending up

- extreme - TX
- slight - AZ

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 lows in the 50s.

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

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

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

Idaho Falls, ID: Partly cloudy skies and some showers with highs in the 40s and low 50s and lows in the 20s and 30s.



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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



Supplies remain steady from Mexico, supported by strong harvests in key regions, while Peru's season winds down as volumes decline toward year-end. Demand is moderate, boosted by holiday retail ads and foodservice menus, though movement is expected to ease slightly after Christmas. Quality is strong overall, with tight tips and good color, though occasional lots may show minor tip softness or slight dehydration from extended transit.

avocados



Shipments from Mexico are steady, supported by strong harvest activity, while Colombian fruit continues to supplement programs for larger sizes. Demand is moderate now but expected to rise post-holiday toward New Year promotions and foodservice resets. Pricing is stable but could firm up as demand picks up. Quality is excellent, with increasing oil content and strong internal condition, making fruit ideal for ripening programs.

bananas



Supply remains ample across key origins, supported by solid quality and smooth logistics. Market participants are watching for potential tightness in 2026, though it remains too early to gauge the extent.

beans



Green Beans: Mexican production is improving after earlier weather delays, and volumes are trending upward as fields recover from cooler conditions. U.S. domestic production is largely finished, leaving imports to cover holiday demand. Movement is strong for holiday menus, keeping pricing firm but stabilizing as supply improves. Quality is good overall, with vibrant color and crisp texture, though occasional scarring or minor cosmetic defects may appear from prior field stress.

berries



Blackberries: **ALERT** Supplies are starting lower, as cool, wet weather has significantly slowed production compared to past weeks. Once conditions improve, volumes are expected to rebound quickly and return to strong levels.

Blueberries: Heading into the import season's lowest period for the next couple of weeks. Peru volumes are declining, and first arrivals from Chile are still pending. Rising production out of Mexico should help balance supply and limit pressure.

Raspberries: **ALERT** Light arrivals to start, with volumes expected to increase as the period progresses. Production continues in Mexico, but supplies have tightened as crops move past their seasonal peak. Overall quality is good, though some soft or overripe fruit is appearing due to recent heat, rain, and humidity in the growing regions.



Market UPDATE

berries cont...



Strawberries: Volumes are improving across all regions. Oxnard quality has rebounded with the new crop, and Santa Maria begins its new crop this week. Mexico continues to increase as it approaches peak volumes in mid-January. Florida started lighter due to cool weather but should pick up as temperatures warm. Overall quality is good, and volumes are expected to continue rising in the coming weeks. Rain in California next week may slow harvest, but increasing Mexican volume should offset any short-term impact.

broccoli



Broccoli: **ALERT** Supplies have tightened significantly, turning around quickly as growers contend with pin rot at the field level, a direct result of heavy fall rains in Yuma. Demand has risen, and product is now shipping out of Yuma, but supplies are expected to remain light over the next several days. Quality is only fair, though the ten-day forecast is favorable with no rain expected. Market pricing has increased, and contracts are now triggered, reflecting the current supply pressure and stronger demand.

Broccolini: Supplies are currently just on par, while demand has continued to increase. Product is now shipping from Yuma, and with the ongoing challenges in broccoli, the market has reacted accordingly. Market pricing has risen, and although contracts will not be escalated, we do expect stronger demand for this item.

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. 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 remain steady, and demand is strong as product begins shipping from Yuma. Supplies are expected to hold steady over the next few days. Quality is fair, but the ten-day weather outlook is favorable with no rain expected. Market pricing is currently good, contracts will not be triggered, and markets are anticipated to increase next week.

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, though contracts are expected to remain elevated heading into next week.



Market UPDATE

citrus



Limes: Markets are active, with Mexico improving after prior rain disruptions and Colombia providing steady volumes of larger sizes. Holiday beverage demand is strong, and pricing is easing slightly from recent highs as supply stabilizes. Quality is good overall, with firm fruit and strong color, though older lots may show styler-end breakdown or minor scarring. Expect continued strong movement into early January, with pricing softening slightly as volumes increase.

Lemons: Heavy supply continues from District 1, with sizing skewed toward larger fruit and strong pack-outs for export and domestic programs. Demand is stable across foodservice and retail. Pricing remains steady, supported by promotional activity. Quality is excellent, with vibrant color, high juice content, and strong rind integrity, though occasional wind scarring may appear in some lots.

Oranges: The Navel crop is in full swing, with strong pack-outs and a favorable sizing profile for retail and foodservice programs. Demand is robust for holiday and juicing applications, and pricing remains steady with promotional support. Quality is outstanding, featuring high sugars, vibrant color, and minimal defects. Domestic demand is expected to remain strong through January.

cucumbers



Supplies remain light, with minimal Florida production and below-normal Honduras imports. Mexico is the primary source, though volumes are currently light across Baja, Central Mexico, and Sinaloa due to cooler weather. Availability is expected to improve next week as Sinaloa rebounds. Quality is generally strong from Sinaloa and Central Mexico, with minor variability in Baja.

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.

herbs



Supplies are consistent across most items, including cilantro, parsley, and dill, but basil remains tight due to cooler temperatures impacting yields. Holiday cooking is driving elevated demand, particularly for fresh herbs in retail and foodservice channels. Pricing is steady for most items but firm for basil, which may remain tight into early January. Quality is strong overall, though basil's shelf life is shorter in transit, requiring careful cold-chain management.

Cilantro: **ALERT** Supplies remain light, though quality is good and demand is steady. Product is now shipping from Oxnard and Mexico. Market pricing is elevated, driven by growing transitions, strong demand, and limited availability. These conditions are expected to persist over the next few weeks.

kale



Supplies have strengthened and are expected to hold steady. Demand remains strong, and quality is fair. Product is now shipping from Oxnard and Yuma, with market pricing holding stable.

lettuce



Green & Red Leaf: **ALERT** Supplies have improved with increased Yuma shipments. Demand has eased, and quality, sizing, and weights are stronger. Pricing remains elevated but should ease as supply and quality continue to build.



Market UPDATE

lettuce cont...



Iceberg: **ALERT** Supplies are holding steady, and demand has recently increased. Product is now shipping from Yuma, with quality, sizing, and weights all expected to improve. Market pricing remains escalated, and contracts will continue to be triggered.

Romaine: **ALERT** Supplies are lighter, and demand has increased. Product is now shipping from Yuma, with quality and weights expected to improve. Market pricing will remain escalated, and contracts will continue to be triggered.

Tender Leaf: Supplies have strengthened with operations now fully transitioned to Yuma. Some fields saw quality challenges, but improvement is expected soon. Market pricing has normalized.

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



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.

onions



RADAR Supplies remain strong with consistent quality. Overall pricing is slightly below last year,

though reds and whites have seen modest increases. Whites are expected to rise further as limited volumes and ongoing quality challenges keep the market tight heading into January. Medium reds are also constrained due to a heavier run of jumbo sizes.

onions green



EXTREME Supplies will remain very limited, with availability reduced under current market conditions. This trend is expected to continue in the next few weeks. Market pricing will stay escalated as demand increases, and overall quality is being reported as only 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



Supplies from Central Mexico remain light to moderate, with steady production but some greening due to cooler weather. Volumes are expected to gradually decline through the end of the season in March. Small volumes are beginning to cross from Western Mainland Mexico, with availability projected to improve in late December and early January as more growers ramp up production and fruit color becomes more consistent.



Market UPDATE

peppers chili



Supplies remain tight nationwide due to limited Florida production and slowed growth in Mexico from cool weather. Availability should improve in the coming weeks as South Florida and Sinaloa ramp up. Overall quality is good, though serranos and tomatillos are more variable, with tomatillos and habaneros especially tight.

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 supplies have returned to typical levels after last week's surge, with South Florida leading production and Plant City contributing for about another week. Availability is adequate, and quality is good, with only minor cosmetic issues. In the West, Sonora is winding down while Sinaloa ramps up, offering mostly good quality as new fields come online.

tomatoes



Florida supplies remain ample with steady availability and very good quality, supported by ongoing harvests in LaBelle and Naples and favorable sizing as crown picks increase. Mexico is in seasonal transition: Baja is nearing the end of its season, while western regions are shipping light to moderate volumes that will taper off into January. Eastern grape tomato supplies are moderate to heavy from Florida, while light volumes from Culiacán have begun crossing and are expected to build to full production by late December to early January.





Market UPDATE

in the news...

Do Your Shoppers Know Potatoes Are Packed With Nutrients?

"All vegetables are healthy, potatoes included," says Shelley Maniscalco, a registered dietitian and partner at Nutrition in Demand, an agency that works with the Alliance for Potato Research and Education.

Tom Burfield | December 19, 2025 | thepacker.com

From a health standpoint, potatoes sometimes have an unfair reputation. However, nutritionists say that not only are tubers not bad for you, but they are also packed with nutrients.

"All vegetables are healthy, potatoes included," says Shelley Maniscalco, a registered dietitian and partner at Nutrition in Demand, an agency that works with the Alliance for Potato Research and Education.

"Potatoes are quite nutrient-dense," Maniscalco adds. They deliver meaningful amounts of fiber and iron and are a good source of potassium, vitamin B6 and vitamin C. A medium-size potato contains about 3 grams of proteins, she adds.

No matter what color or variety of tuber one eats, Maniscalco says, "They all provide comparable vitamins and minerals."

The difference is how they're used and in the phytonutrients they offer.

"Color is an indication of the phytonutrient pigments that are in the skin," she says.

They can vary slightly from one color to another, which is why it's a good idea to eat a variety of potatoes.

"One of the best things about potatoes is that people genuinely enjoy them," she says.

Power Pairings

Potatoes don't create a consumer barrier like some veggies that don't exactly tingle the taste buds.

"They're versatile across cultures and can be paired with healthy nutrient ingredients," she says.

Maniscalco says she loves broccoli on a baked potato, but tomatoes, peppers, Brussels sprouts and carrots also make good additions. Beans, lentils or yogurt can add even more protein.

How they're prepared also makes a difference. A baked potato tastes different from one that is roasted or air fried.

The Potatoes USA recipe website, potatogoodness.com, lists a plethora of fun, creative recipes, Maniscalco says.

Misunderstood Effect

Potatoes' ranking on the glycemic index can be misleading. The GI is a research tool to measure how individual foods affect blood sugar, she says. It was not designed for public dissemination.

"It doesn't reflect real-world eating patterns," Maniscalco says. "Studies have shown that when potatoes are consumed as part of a mixed meal, they'll have similar effects on blood sugar as other carbohydrates."

Eating the skin can be extra beneficial because the fiber in the skin helps to slow down the effects of the



Potatoes are versatile across cultures and can be paired with healthful nutrient ingredients, like avocados, tomatoes, peppers, brussels sprouts and carrots, says Shelley Maniscalco, a registered dietitian and partner at Nutrition in Demand, an agency that works with the Alliance for Potato Research and Education.

carbohydrates releasing sugar into the blood, according to Maniscalco.

Digging Into Research

Here are findings from the four most recent peer-reviewed papers funded by the Alliance for Potato Research and Education:

- In a tightly controlled feeding study, the results showed when athletic men ate a diet where potatoes supplied about 60% of their calories during short-term calorie restriction and exercise, their muscles shifted toward greater efficiency and endurance...

[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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