

Market **OUTLOOK**

Week 50: December 8-14, 2025



Market ALERT

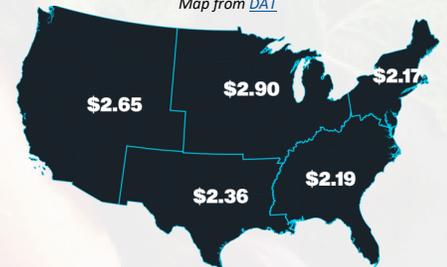
- Beans
- Berries
- Broccoli
- Brussels Sprouts
- Carrots
- Celery
- Cilantro
- Green Onions
- Lettuce
- Mushrooms
- Onions
- Pepper Chili
- Squash

transportation

- Nat'l Diesel Avg: \$3.758↓
- Last Year: \$3.54↑
- Nat'l Fuel Surcharge: \$0.46
- Shortages: Rates are flat
 - extreme - N/A
 - slight - AZ, CA, & TX

National Posted Rate per mile

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



weather **OUTLOOK**

- Oxnard, CA:** Mostly sunny with some cloudy skies with highs in the 60s and 70s and lows in the 50s.
- Salinas, CA:** Partly cloudy skies with some sun and highs in the 60s and lows in the 40s.
- Yuma, AZ:** Sunny skies with highs in the 70s and 80s and lows in the 50s.
- Immokalee, FL:** Partly cloudy skies with some sun with highs in the 70s and lows in the 50s.
- Idaho Falls, ID:** Partly cloudy skies and some showers with highs in the 40s and 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 from Mexico and Peru remains steady with overall good quality. Demand is moderate, and pricing is expected to stay firm. Mexican weather is being monitored closely, as cooler conditions could slightly tighten the market.

avocados



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bananas



Supply remains steady with strong quality across major growing regions. Pricing is expected to stay stable, with no major disruptions anticipated. Tariff relief continues to exert slight downward pressure on delivered costs.

beans



Green Beans: Supplies has improved and market price are steady.

Snow Peas: **ALERT** Guatemalan supply remains limited due to weather and is expected to stay tight for two weeks, while Peru are done.

berries



Blackberries: Supplies are steady, with fair quality. Quality concerns in Mexico are improving as humidity-related challenges ease. While there have been minor delays with product from Mexico, good supplies and stable market pricing are expected over the coming weeks.

Blueberries: There were some delays due to late container arrivals and a truck labor stoppage in Mexico. Despite this, production has ramped up quickly, with an estimated 30% increase in volume crossing from Mexico. This trend is expected to continue through December, supporting strong supply levels.

Raspberries: **ALERT** Supplies are limited from Southern California as some regions are ending and others face weather-related delays. Challenges are expected to persist through December. Production in Southern Mexico is ongoing, with overall quality reported as fair. Increased crossings from Mexico should help improve availability over the next several weeks.

Strawberries: **EXTREME** Supplies are improving across key regions. In Santa Maria, mild weather and no rain are forecast, supporting good fruit quality and slightly higher counts, though volumes remain low and will increase gradually. The spring crop shows strong potential for late December. Florida reports excellent quality and steady volume growth, with production expected to surge around Christmas. Mexico continues to deliver strong quality and increasing output, helping offset earlier storm-related losses in California. Overall, supply is tight now but expected to strengthen through December as Florida and Mexico ramp up.



Market UPDATE

broccoli



Broccoli: Supplies have improved as demand has eased. Product is now shipping from Yuma, with availability expected to continue strengthening in the coming weeks. Quality is reported as good, and the 10-day forecast shows favorable conditions with no rain, allowing harvest crews consecutive days in the field. Further improvements in quality and supply are anticipated by month's end, while market pricing continues to trend downward.

Brocolini: Supplies and overall quality have improved as growers transition to the Yuma region. Limited availability has kept pricing elevated, and markets are expected to remain firm. Continued improvements in supply and pricing are anticipated in the coming weeks.

brussels sprouts



EXTREME Supplies are extremely limited, with fair quality. Availability is expected to remain tight for the next week or two as Mexico lags in production and labor strikes further constrain supply. Gradual improvement is anticipated, though volumes will likely stay below normal until the growing region fully transitions

cabbages



Supplies have improved with better yields and quality in Yuma. Demand has eased following the holiday period, and continued improvement in supply is anticipated in the coming weeks.

carrots



The carrot market is in great shape with strong availability across all sizes. Quality remain excellent, and pricing is expected to remain stable into next week.

cauliflower



Supplies are very strong as demand has eased. Product is shipping from Yuma, with availability expected to continue improving in the coming weeks. Quality is good, supported by favorable weather with no rain in the forecast. Market pricing is improving, and steady conditions are anticipated in the weeks ahead.

celery



Supplies remain very light as holiday demand adds pressure to the market. Additional acreage coming online in Yuma should provide some relief in the weeks ahead. Market pricing is expected to stay elevated until supplies improve.

citrus



Limes: Mexican supply is steady, though cooler weather may slightly slow harvest. Colombian fruit continues to supplement the market. Overall quality is good, with only minor skin scarring noted. Demand is firm, and pricing is expected to stay stable.

Lemons: California's crop is at peak condition, offering excellent quality and strong sizing. Supply is robust, and demand remains steady.

Oranges: Navel season is in full swing, showcasing outstanding internal quality and vibrant color. Supply is strong, and demand is trending upward with holiday programs.

cucumbers



Florida's winter field production is minimal, shifting Eastern demand to Mexico and Honduras. Honduras will begin mid-December with lighter volumes as some growers skipped planting. Mexico has moderate supplies, with Baja winding down while Sonora and Sinaloa



Market UPDATE

cucumber cont...



ramp up, offering the best quality and color. Central Mexico remains light. In the near term, availability should stay steady to moderate, improving as Northern and Western Mexico expand production and Honduras adds seasonal product.

grapes



Imports are arriving with excellent early-season quality. Peru's harvest is in full swing, boosting volume on both East and West Coasts. Pricing should remain steady with improved supply, and color, firmness, and sizing continue to show strong performance.

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: ALERT Supplies are light, though quality remains good. Product is shipping from Oxnard, and Mexico. Market pricing has risen with growing transitions and strong demand, and supplies are expected to stay limited with elevated pricing in the coming weeks

kale



Supplies are steady with fair quality, and demand remains strong. Product is shipping from Salinas and Oxnard, with market pricing stable. Conditions are expected to remain consistent over the next several weeks.

lettuce



Green & Red Leaf: ALERT Supplies have improved

as demand has decreased with growers now harvesting in the Yuma. Quality, sizing, and weights have strengthened. Market pricing remains elevated, and contracts are being triggered. Supplies and quality are expected to continue improving over the next few weeks, with pricing easing as availability increase.

Iceberg: ALERT Supplies have improved as demand has eased, with growers now harvesting in Yuma. Quality and weights are expected to improve. Market pricing remains elevated, and contracts are being triggered, but is projected to trend downward as supplies and quality continue to build over the next few weeks.

Romaine: ALERT Supplies have improved as demand has eased, with growers now harvesting in Yuma. Quality and weights are expected to improve. Market pricing remains elevated, and contracts are being triggered, but is projected to trend downward as supplies and quality continue to build over the next few weeks.

Tender Leaf: Supplies have improved as growers and processors transition to Yuma. Quality and availability are expected to continue strengthening, while market pricing remains elevated but is projected to ease over the next few weeks.

melons



Imports remain steady on the East Coast, with West Coast arrivals beginning. Quality is strong, with solid internal characteristics and consistent sizing. As more vessels land, national availability will improve, helping stabilize markets. Good supplies and stable pricing are expected.

mushrooms



Supplies of white and brown remain very limited, and demand has increased. Quality is only fair due to gnat infestations at the farm level. Many



Market UPDATE

mushrooms cont...



insecticides previously used are no longer approved or effective, and resistance has developed. Colder weather will help reduce gnat populations, but this issue is expected to persist for several weeks. Supply challenges are likely to continue through December.

Central Mexico is the main source with light to moderate supply and generally good quality, though some light greening is noted during transition. Western Mexico will begin harvesting in 2–3 weeks and quickly become the primary region, improving availability and supply.

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 rise further as volumes remain limited. Whites are facing quality challenges and are likely to be tight heading into January, while medium reds are constrained by the predominance of jumbo sizes.

peppers chili



ALERT Eastern Florida is shipping light volumes of jalapeños, poblanos, Cubanelles, and long hots. Serrano and habaneros are expected in about two weeks. With limited tomatillo production in Florida, the East relies on Mexico, where Baja is winding down and Sinaloa is ramping up. Supplies remain tight, particularly on Anaheim and serrano, but volumes should improve as Sinaloa expands. Overall quality is good, though tomatillos show occasional issues.

onions green



EXTREME 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.

pineapples



Markets are tightening as growers raise concerns about Q1 2026 supply. Demand remains elevated, and available volumes may fluctuate by region. Import arrivals are consistent, though sizing will vary. Expect firmer markets and potential upward pricing pressure.

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.

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.

peppers bell



With Canada’s season done, production has shifted to Mexico and winter import programs.



Market UPDATE

squash



Florida yellow squash supplies have tightened after an early start, with harvest centered in Plant City and more fields expected in 2–3 weeks. Quality is good. In Mexico, Sonora has light yellow squash but stronger zucchini, while Sinaloa is just beginning and will become the main source. Yellow squash supplies remain tight, with gradual improvement anticipated as Florida expands and Sinaloa increases production.

tomatoes



Florida supplies are improving as growers move south. Roma volumes are rebounding, and Naples will start mid-December. Picks show strong size and quality. Round production is steady with large sizes early, easing slightly later, and grape volumes remain strong with very good quality. In the West, current supply from Baja, Central Mexico, and Sonora is tapering as Culiacán ramps up mid-December to become the main region. Quality is generally good, and overall availability

commodities alert overview

Green beans are tight after Georgia’s early finish; Florida is starting light harvests, and Sinaloa will boost supply later this month. **Snow peas** remain scarce from Guatemala, and Peru has ended production. **Blueberries** are improving, but **raspberries** and **strawberries** face shortages from weather impacts in California and Mexico. **Broccoli** and **broccolini** supplies are recovering in Yuma, while **Brussels sprouts**, **green onions**, **celery**, and **mushrooms** remain very limited. **Lettuce** and **cilantro** are improving slowly, though pricing stays high. **Chili peppers** and **squash** are tight but should strengthen as Sinaloa ramps up.





Market UPDATE

in the news...

US Produce industry speaks up: The potential impact of the upcoming USMCA agreement review

December 1, 2025 | freshfruitportal.com

The 2026 joint review of the United States-Mexico-Canada Agreement (USMCA) will take place next July, and the produce industry is working to maintain its influence in the decision-making process.

The three countries, which represent 30 percent of global GDP, will determine the future of their trade agreement, which is set to expire in 2036. The decision has the power to reshape North American trade and US agriculture.

USMCA's Impact on North American produce trade

Since the removal of the final transitional agricultural trade restrictions under the North American Free Trade Agreement (NAFTA) in 2007, US agricultural trade with Mexico and Canada has strengthened.

Today, both US neighbors are the top two export markets for American fruits and vegetables. In 2024, fresh produce trade among the three countries totaled \$35 billion.

Since USMCA replaced NAFTA in 2020, total North American trade has reached \$1.88 trillion, with double-digit year-on-year growth.

From 2021 to 2023, US imports from Mexico increased by over 100 percent, rising from \$8.2 billion to

\$19.6 billion.

Fresh Voices: Produce industry chimes in

To ensure the agricultural industry's interests are considered in the upcoming USMCA review, leading grower organizations have submitted comments to the agreement's public docket and issued statements.

In a letter to US Trade Representative Jamieson Greer, government officials and major organizations, including the California Citrus Mutual (CCM) and the Organic Produce Association (OPA), expressed support for the agreement.

The letter states that, thanks to the treaty's "seamless integration provided under the agriculture provisions," US agricultural exports to Mexico and Canada increased by \$10.7 billion and \$7.6 billion, respectively.

The letter also notes that USMCA's integration of agricultural provisions streamlines compliance, harmonizes regulations, facilitates cross-border trade, and reduces costs for American farmers, producers, and ranchers.

The International Fresh Produce Association (IFPA) also supports the agreement and hopes any revisions will further strengthen the movement of specialty crops across North America.



In a press release, the organization said that since its implementation, "the USMCA has provided critical market access and stability for the fresh produce sector—supporting a highly integrated North American supply chain that enables year-round delivery of nutritious, high-quality, and affordable fruits and vegetables to US consumers."

Not Everyone's on Board

The California Avocado Commission, on the other hand, believes the USMCA should be modified to reinstate prior inspection protocols and establish a tariff-rate quota on avocado imports from Mexico.

According to CAC's comments, "over the past two decades, the steep...

[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!

Your Dedicated NPC Powered by Foodbuy Staff