

Market **OUTLOOK**

Week 12: March 17-23, 2025



Foodbuy
Foodservice

Market **ALERT**

Beans
Berries
Broccolini
Citrus
Herbs
Melons
Pears
Pineapples

transportation

Nat'l Diesel Avg: \$3.582↓

Last Year: \$4.004↓

Nat'l Fuel Surcharge: \$0.42

Shortages: Rates are decreasing

- **extreme** - N/A
- **slight** - AZ & CA

National Posted Rate per mile

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



weather **OUTLOOK**

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

Salinas, CA: Cloudy skies with highs in the 50s to 60s and lows in the 40s. Rain showers on Monday.

Yuma, AZ: Sunny skies with highs in the 70s to 80s and lows in the 50s.

Immokalee, FL: Sunny skies with highs in the 80s and lows in the 50s.

Idaho Falls, ID: Mostly cloudy skies with highs in the 40s and lows in the 20s to low 30s. Morning snow showers on Monday.



Market UPDATE

apples



Washington's 2024 crop is expected to be of outstanding quality due to favorable growing conditions. The forecasted crop is 124 million, down 136 million. However, Red Delicious, Gold Delicious, Granny Smith, Gala, and Fuji have decreased. Cosmic has increased, with 2.8 million boxes. As Washington faces a 12 million box deficit, prices are expected to rise. Despite this, there is still ample fruit to ship year-round.

asparagus



Prices are stable. Mexican production is strong, peaking in Caborca, but it is expected to decline from late March into early April. The market is steady, with good quality and size distribution, particularly for large and jumbo varieties and ample white asparagus supplies.

avocados



Due to last week's tariff confusion, Mexico volumes dropped to 43.7 million lbs., well below the expected 60 million lbs., creating a volatile market. Prices are rising, especially for smaller sizes, which are in high demand but limited supply. This week focuses on rebuilding inventories, with more time needed before Holy Week (week 16) and Cinco de Mayo. The market will likely fluctuate slightly but remain high-priced until Cinco. Significant Peruvian volumes could lower prices. Current Mexico crop: Normal/Marceña, with a dry matter average of 33.4%. Recommended storage temperature is 38°F.

bananas



The market continues to be steady, with strong supply and excellent quality.

beans



Green Beans: **RADAR** Prices are stable. French beans are less available in some pack sizes due to vessel delays and limited supply in Mexico due to adverse weather, though quality remains generally good. Green beans from Nogales and Florida are in excellent supply and quality.

Snow Peas: **RADAR** Prices are stable this week. Supplies are steady from Guatemala and Mexico. Guatemalan supplies are expected to decline gradually in the next 2-3 weeks.

berries



Blackberries: Prices are steady with good quality from Mexico, and steady volume is expected to peak through the end of July.

Blueberries: Prices are steady. Quality is excellent out of Mexico, with peak production lasting until mid-April. Oxnard organic blueberries are ramping up, expecting peak volume in late March. Florida's production is set to begin shortly, with the first pickings planned for next week.

Raspberries: Prices are stable. Good quality, displaying a vibrant red color, good sizes and firmness, with steady volumes from Mexico.

Strawberries: **RADAR** Prices are stable. Santa Maria's harvest was disrupted by rain, leading to potential quality issues. In Florida, fields recovered well, with effective botrytis management and careful harvesting ensuring quality fruit and promising yields. In Mexico, rising temperatures are causing some growers to finish early or reduce production as the season has already peaked.



Market UPDATE

broccoli



Broccoli: Supplies and pricing are steady, with moderate demand. Supplies are shipping from Yuma and Mexico.

Brocolini: **RADAR** Supplies and demand are light this week. Pricing from Yuma is expected to increase with limited supplies.

brussels sprouts



The supply and quality have improved, with good demand. Market pricing has decreased. Mexico supplies are now available, and markets are expected to remain steady for the next few weeks with improved supplies and pricing.

cabbages



The market is improving, with improved yields and quality from Oxnard and Yuma and a steady supply.

carrots



Supply is stable, with strong quality and temporary sizing issues resolved. Demand is stable, and good availability.

cauliflower



Supply is light and demand is fair. Mexico supplies are available, and quality is fair. Pricing is increasing and is expected to continue the next few weeks.

celery



Supplies continue to be good from Yuma and Oxnard, with good quality. Market pricing is steady and expected to improve as demand decreases.

citrus



Limes: **ALERT** Pricing is up. The fluctuating tariff threat has disrupted the market, causing Mexican producers to slow operations. Overall yields are declining, with small sizes peaking and large fruit scarce.

Lemons: Pricing is steady. Quality is good, and supplies are plentiful for all sizes.

Oranges: Pricing is steady. Fruit quality is excellent, with peak sizing on 88's. Recent rains have supported growth, but smaller sizes may see price increases as volumes decrease. Strong juice prices help maintain overall price stability.

corn



Pricing is steady. Overall, supplies and quality are good. Mexico is starting to wind down. Markets could see an uptick in pricing until California gets going in early April.

cucumbers



Pricing is steady. Honduran volumes are lighter due to reduced acreage, but quality has improved. Florida's season starts soon, and Mexico's supply remains strong until May.

grapes



The prices of offshore imports are stable. Importers are struggling with an oversupply in the U.S., causing declining exports and prices. Chilean exporters diverted aging inventory to other markets, while Peruvian volumes decreased. Quality is inconsistent, especially in red seedless grapes. Green seedless grapes from Chile are stable, and the market may stabilize with possible price increases by mid-April.



Market UPDATE

herbs



Basil: Supplies are still limited but improving.

Cilantro: Supplies are on budget, with good quality. Demand is moderate, and supplies are shipping out of Oxnard and Yuma. Supply is expected to be limited for the next few weeks with escalated market pricing.

Dill: Supplies are limited on the east coast due to rain in Colombia.

Tarragon: Supplies have improved slightly. Supply on the west coast is recovering from previous cold weather challenges.

kale



Supply and market pricing are steady with good demand and quality.

lettuce



Green & Red Leaf: The supply and quality are good along with size and weight, with decreased demand coming from Yuma. The supplies and markets are expected to remain steady for a few weeks. Warmer weather should help with supplies.

Iceberg: Supplies are light with fair quality. Demand has slowed down, and sizing and weights will be smaller out of Yuma. Pricing is expected to increase. Supplies are expected to increase with warmer weather and growers starting out of Huron, CA.

Romaine: The supply is good out of Yuma, with increased demand. Quality is good along with size and weight. Market pricing is expected to remain steady. Warmer weather should help with supplies.

Tender Leaf: Supply is steady with improved quality and good demand. Warmer weather

should help with supplies.

melons



Cantaloupe: **RADAR** Prices are stable. Quality is high, and strong Guatemalan production is expected to continue for the next few weeks. Sizing varies among growers, but most are peaking at 12/15s. They have a vibrant straw color, firmness, and a 13-15% brix sweetness.

Honeydew: **RADAR** Prices are stable. The market faces a two-tier situation due to varying quality across regions, with some brands offered at lower prices. Honeydew production shows good sizing and condition, peaking on 5s, followed by 5Js and 6s.

mushrooms



Quality is good, and most growers have improved their supply challenges. No price increases are expected. End users can be less affected by combining white and brown.

onions



Quality is good across all growing regions, with steady demand. Market prices on yellows and reds are steady, while whites are active and expected to continue to increase, possibly into February. The availability of whites is getting a little tight, with reds not too far behind. Mexico is buying a lot of whites and reds. Freight is beginning to increase.

onions green



Supplies are on budget and quality is good coming out of Mexico. Demand continues to be good with a steady market.



Market UPDATE

pears



RADAR The Northwest Bartlett crop is ending quickly, with only a few sizes and grades available for the next few weeks. The D'Anjou crop is down significantly in the Wenatchee growing district, but not as severely in the Yakima Valley and Oregon growing districts with the current movement; it will go through mid to the end of July. Bosc are down significantly in all growing regions, causing higher prices this season. Northwest Bosc is down 825k boxes, and Red Anjous have ample supply through June. All varietal pears, such as Forelle, Seckel, and Comice, are done for the season.

peppers bell



Pricing is trending slightly up on green peppers due to lighter supplies on both coasts. The colored peppers market remains steady with good volumes across the board.

peppers chili



Pricing is steady. South Florida farms have light supplies, but new fields will come online soon, boosting availability. Mexico has consistent chili pepper production.

pineapples



The pineapple market remains tight, with yield declines in Costa Rica continuing to impact supply, particularly for larger sizes (5s, 6s, 7s). Strict availability on larger sizes is expected to persist for the next 4-6 months.

potatoes



The Idaho market pricing is steady, with good quality. Yields are slightly down from last year. Despite the decrease, Idaho is expected to continue to have plentiful availability.

squash



Pricing is trending up. Florida's production is steady, with volumes expected to increase in 1-2 weeks as new fields come online. Quality is good overall, with some inconsistencies in yellow squash. In Mexico, Sinaloa's production has decreased, but new plantings and Sonora's upcoming season will boost supply.

tomatoes



Pricing is trending up slightly as Florida experiences lighter volumes due to the transition to spring production. While supplies remain



in the news...

Egg prices are rapidly falling so far in March

Brian Evans • March 13, 2025 | [cnbc.com](https://www.cnbc.com)

Egg prices have fallen sharply so far in March on some progress in ending a shortage, giving consumers some much-needed relief with the supermarket staple.

The cost of white large shell eggs declined to \$6.85 per dozen, on average, last week, according to data from the U.S. Department of Agriculture. That represents a decline of \$1.20 per dozen, and a 15% pull back the USDA's prior update on Feb. 28.

“Demand for shell eggs continues to fade into the new month as no significant outbreaks of HPAI [highly pathogenic avian influenza] have been detected in nearly two weeks,” the USDA wrote in its March 7 weekly update. “This respite has provided an opportunity for production to make progress in reducing recent shell egg shortages.”

Egg prices have become a key pressure point for consumers that are tired of sticky inflation and worried about more potential price increases due to President Donald Trump's tariffs on a wide array of imports. While it is still unknown the full ramifications of the duties on Canada, China and Mexico, stocks have so far pulled back in 2025 on concern the moves could further raise prices of goods and tip a sagging economy into a recession.

To be sure, the price of eggs have still skyrocketed more than 170% from a year ago, USDA data shows. The rise has spurred an investigation by the U.S. Department of Justice into allegations of anticompetitive practices from some of the largest egg producers in the country. Firms including Cal-Maine Foods have touted a crushing avian flu outbreak, which has forced the culling of millions of egg-laying hens, as the major catalyst for the rise in egg prices.



Chickens stand next to stacks of eggs in a henhouse at Sunrise Farms on February 18, 2025 in Petaluma, California. Justin Sullivan | Getty Images News | Getty Images

“The primary reason for the drop in actions taken by the administration's Department of Justice to investigate the companies for possible antitrust violations,” said Joe Maxwell, president of Farm Action Fund, told...

[Read full article HERE](#)





Market UPDATE

Transition Schedules - Spring 2025

| Grower / Shipper | Current Location | Transitioning | Commodity | Transition Dates | |
|-------------------|------------------|-----------------|--------------------------------|------------------|--------------------|
| Bengard Ranches | Yuma, AZ | Salinas, CA | Broccoli Crowns | 03/22/25 | |
| Bengard Ranches | Yuma, AZ | Salinas, CA | Cauliflower | 03/25/25 | |
| Bengard Ranches | Yuma, AZ | Salinas, CA | Lettuce Iceberg | 04/15/25 | Huron - 19/2025 |
| Bengard Ranches | Yuma, AZ | Salinas, CA | Lettuce Green Leaf / Red Leaf | 04/15/25 | |
| Bengard Ranches | Yuma, AZ | Salinas, CA | Lettuce Romaine | 04/05/25 | |
| Bengard Ranches | Yuma, AZ | Salinas, CA | Celery | 06/15/25 | Oxnard - 3/18/2025 |
| Church Brothers | Yuma, AZ | Salinas, CA | Broccoli Crowns | 03/31/25 | |
| Church Brothers | Yuma, AZ | Salinas, CA | Cauliflower | 03/31/25 | |
| Church Brothers | Yuma, AZ | Huron, CA | Lettuce Iceberg | 04/08/25 | |
| Church Brothers | Yuma, AZ | Salinas, CA | Lettuce Green Leaf / Red Leaf | 04/08/25 | |
| Church Brothers | Yuma, AZ | Salinas, CA | Lettuce Romaine | 04/08/25 | |
| Church Brothers | Yuma, AZ | Oxnard, CA | Celery | 04/08/25 | |
| Church Brothers | Yuma, AZ | Salinas, CA | Value Added / Processing Plant | 04/13/25 | |
| Field Fresh Farms | Yuma, AZ | Watsonville, CA | Broccoli Crowns | 03/31/25 | |
| Field Fresh Farms | Yuma, AZ | Watsonville, CA | Lettuce Iceberg | 03/31/25 | |
| Field Fresh Farms | Yuma, AZ | Watsonville, CA | Lettuce Green Leaf / Red Leaf | 03/31/25 | |
| Field Fresh Farms | Yuma, AZ | Watsonville, CA | Lettuce Romaine | 03/31/25 | |
| Field Fresh Farms | Yuma, AZ | Watsonville, CA | Value Added / Processing Plant | 03/31/25 | |
| Green Gate Fresh | Yuma, AZ | Salinas, CA | Value Added / Processing Plant | 04/20/25 | |
| River Fresh Farms | Yuma, AZ | Salinas, CA | Broccoli Crowns | 03/23/25 | |
| River Fresh Farms | Yuma, AZ | Salinas, CA | Cauliflower | 03/23/25 | |
| River Fresh Farms | Yuma, AZ | Salinas, CA | Lettuce Iceberg | 04/16/25 | Huron - 3/20/2025 |
| River Fresh Farms | Yuma, AZ | Salinas, CA | Lettuce Green Leaf / Red Leaf | 04/04/25 | |
| River Fresh Farms | Yuma, AZ | Salinas, CA | Lettuce Romaine | 04/04/25 | |
| River Fresh Farms | Yuma, AZ | Salinas, CA | Celery | 06/15/25 | Oxnard - 3/20/2025 |
| River Fresh Farms | Yuma, AZ | Salinas, CA | Value Added | 04/14/25 | |
| Taylor Farms - CA | Yuma, AZ | Salinas, CA | Value Added / Processing Plant | 04/14/25 | |
| The Salad Farm | Yuma, AZ | Hollister, CA | Value Added / Processing Plant | 03/31/25 | |