

Market OUTLOOK

Week 20: May 12-18, 2025


Foodbuy
Foodservice

Market **ALERT**

Asparagus
Beans
Berries
Brussels
Chili Peppers
Citrus
Grapes
Herbs
Melons
Pineapples

transportation

Nat'l Diesel Avg: \$3.497↓

Last Year: \$3.894↓

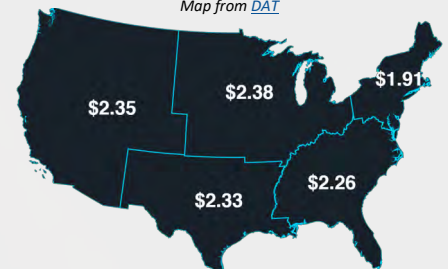
Nat'l Fuel Surcharge: \$0.43

Shortages: Rates are flat

- extreme - N/A
- slight - FL

National Posted Rate per mile

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



weather OUTLOOK

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

Salinas, CA: Mostly sunny and partly sunny skies with highs in the 60s and lows in the lower 50s.

Yuma, AZ: Sunny skies with highs in the 80s and 90s, and lows in the 60s.

Immokalee, FL: Partly cloudy and sunny skies with highs in the 80s to 90s and lows in the high 60s. Thunderstorms Monday and Tuesday.

Idaho Falls, ID: Partly cloudy skies with highs in the 50s to 60s and lows in the 30s and 40s.



Market UPDATE

apples



Washington's crop for Q2 will have good supplies and quality from CA storage. Honeycrisp apples are down 3.4 million boxes from last year but will remain strong until the new crop in late August. Granny Smith demand is strong. Foodservice promotable volumes in Q2 include red skin varieties like Red, Gala, Fuji, and Pink Lady.

asparagus



Prices are escalated. Peru's market is experiencing good volume and supply, with moderate demand. Jumbo and XL sizes are expected to have low volume. Domestic harvests are expected to begin in a week or two.

avocados



Cinco de Mayo, the second-largest avocado event of the year, has seen weaker demand. Market prices are declining as supply diversifies, reducing Mexico's dominance. California is peaking on 48s, Colombia on 70s, and Peru is offering larger sizes, creating more options. Mexico's 60ct volume remains high, but its market share fell to 69% last week and will continue declining as Peru's supply increases until July. Stability is expected after post -Cinco adjustments. It is recommended to store fruit from Mexico at 38°F and California at 42°F.

bananas



Supply and quality remain steady, with stable market conditions and potential minor freight-related price adjustments.

beans



Green Beans: **RADAR** Prices remain elevated as the market stays active during the transition. Florida's season is ending, with production

shifting north. Hot weather and wind have impacted yields, while Mexico's recovery keeps supply tight. Improvements are expected by mid-to-late May as North Florida production begins.

Snow Peas: **RADAR** Prices remain steady. Guatemala's volumes are low due to weather and will stay limited for 2-3 weeks. Peru is expected to begin shipping in the same timeframe.

berries



Blackberries: Prices are stable. Good quality from Mexico, though recent pruning has led to a slight dip in production, with volume remaining steady.

Blueberries: **ALERT** Prices are increasing. In Mexico, quality is good despite some heat-related issues, with conventional volume decreasing weekly and organic production starting in August. Florida's quality is good, but production is down 30%-50% due to past weather events. Oxnard's organic blues have great quality, but production will decline until the end of May.

Raspberries: Prices are trending higher. Quality is strong from Mexico, and volume is currently low but expected to increase steadily through May.

Strawberries: **RADAR** Prices are steady. Fruits from Santa Maria are showing good quality and are expected to stay steady due to favorable weather, and production is at its peak for the Spring Crop season. In Watsonville/Salinas, quality and production are great, with estimates doubling weekly as the peak season in June nears.

broccoli



Broccoli: Supplies and pricing are steady, with moderate demand. Supplies are shipping from Salinas and Mexico. The markets are expected to be steady for the next few weeks.

Broccolini: Supplies and demand are good, with improved quality and pricing from Salinas.



Market UPDATE

brussels sprouts



Supplies remain tight, with fair quality and strong demand. Mexico's volumes are down, causing the market to increase and expected to be elevated for the next few weeks.

cabbages



Supplies are steady with improved quality, market pricing, and yields from central California.

carrots



Supply and quality are strong, with stable pricing and seasonal demand. Good availability across all packaging styles.

cauliflower



Supplies and the market are steady with light availability and moderate demand from Mexico and Salinas.

celery



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

citrus



Limes: ALERT Pricing is up. Mexico is producing smaller sizes (175s and smaller), while larger sizes have been extremely scarce due to lack of rain.

Lemons: ALERT Prices are steadily rising. District 1 will wrap up in two weeks, shifting focus to District 2. Larger fruit sizes (115s, 95s, 75s) are plentiful, while smaller sizes (140s) are limited. Winds in District 2 have reduced fancy-grade fruit, likely pushing prices higher. Larger sizes

remain the best for promotion.

Oranges: Market remains steady. Fruit quality is excellent, with strong demand for smaller sizes.

corn



The market remains steady. Supply out of the west has been good, and Florida remains steady.

cucumbers



The market remains steady. Eastern supply is light as South Florida winds down, but Georgia will boost volume soon. In the West, Mainland Mexico, Central Mexico, and Baja are providing moderate volumes with good quality.

grapes



The prices of offshore imports are higher. South American red seedless lead the market, with marketers holding back top-quality fruit to extend availability until late May, when Mexican volumes are expected. Green seedless supplies are steadily declining as importers fulfill current commitments. Limited shipments from Mexico and premium varieties from Peru and Chile are keeping the market tight, with strong demand expected through May.

herbs



ALERT In the East, basil, mint, and chervil quality is fair due to ongoing rain in Colombia, though supply is adequate. West Coast supplies remain strong.

Cilantro: Supplies remain steady with good quality and moderate demand. Increased availability in Oxnard and Salinas is expected to support market improvements.



Market UPDATE

kale



Supplies and pricing remain steady with good demand and quality coming from Salinas.

lettuce



Green & Red Leaf: Supplies and quality are good, along with sizing and weights. Demand has increased, leading to higher market prices. Steady supplies from Salinas.

Iceberg: Supplies and quality are good with increased demand. Sizes and weights have improved from Salinas. Markets and supplies expected to be good in the next few weeks.

Romaine: Supplies and quality are good with increased demand. Sizes and weights have improved from Salinas. Markets and supplies are anticipated to be good in the upcoming weeks.

Tender Leaf: Supplies are good with increased demand and fair quality. Steady supplies from Salinas. Market and supplies are expected to be good in the next few weeks.

melons



Cantaloupe: **RADAR** Sizing has returned to a more typical pattern of 9/12s, with some 15s and limited jumbo fruit. Recent weather in western Guatemala has affected the fruit color, but Brix levels remain mostly between 13-15%.

Honeydew: **RADAR** Offshore honeydew supply is limited as some growers reduced late-season production. Mexican volumes are expected to increase this spring.

mushrooms



The quality and yields of white and brown are excellent. There are no pricing increases anticipated.

onions



Quality remains strong across all growing regions, with steady demand. California, Arizona, and Georgia have started, while New Mexico faces a slight delay. Texas supplies are limited due to weather impacts.

onions green



Supplies are steady with good demand. Improved availability, and markets are expected to remain steady in the coming weeks out of Mexico. However, increased temperatures in Mexico may cause quality cosmetic issues.

pears



The Pacific Northwest crop has strong demand and steady prices. Bosc is finishing up, leaving Anjou and Red Anjou. Anjou is peaking on 80/90s. Green Anjou should be available through early August, bridging the gap until the new crop Bartlett starts in mid-August.

peppers bell



The market remains steady. Canada supplies consistent quality colored bell peppers, while Central Mexico has light availability, with more expected as new fields begin harvesting. South Florida's green bell season has ended, with light volumes in Central Florida. Georgia and California's desert regions are ramping up, helping offset Mexico's seasonal decline.

peppers chili



Pricing is trending down. Plant City is harvesting most chili varieties with good quality and a steady supply. In the West, lighter supply from Central Mexico is keeping the market strong.



Market UPDATE

pineapples



RADAR Supply is stabilizing with improving yields, especially in larger sizes. Quality is getting better, and pricing is leveling out. Flexibility on sizing is advised, as smaller sizes remain limited.

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



The market remains steady. Yellow and zucchini

squash supplies are strong, with zucchini more abundant. Quality is good, and steady availability is expected through May, with new regions ensuring continued summer supply.

tomatoes



Roma prices are slightly up. Florida's production remains light to moderate, with strong quality and an expected volume boost next week. Mexico's Roma supply is stabilizing as new crops come in. Florida is in full production of rounds with good quality, while Mexico transitions. Grape volumes are excellent in Florida and steady in Mexico, supported by new fields.





Market UPDATE

in the news...

Farmer Sentiment Improves as Long-Term Optimism Outweighs Tariff Concerns

Purdue University • May 8, 2025 | croplife.com

Farmer sentiment improved in April as producers expressed more optimism about current and future conditions on their farms. The Purdue University/CME Group Ag Economy Barometer rose 8 points to a reading of 148, up from 140 in March. The Index of Current Conditions climbed 9 points to 141, while the Index of Future Expectations increased 8 points to 152. The improvement in sentiment came amidst ongoing tensions with many of U.S. agriculture's largest trading partners, including Mexico, Canada and China. Notably, a majority of producers said they believe the increased use of tariffs will ultimately benefit the U.S. agricultural economy; a view reflected in the stronger future expectations reading. The April barometer survey took place between April 14-21.

Producers seem to be gaining confidence in the ag economy's longer-term outlook in spite of concerns they have about the impact of tariffs. This month's results suggest some

producers are starting to look beyond near-term uncertainty and focus more on positioning their farms for the future.

The Farm Capital Investment Index rose to 61 in April, a 7-point increase from March and the highest investment index reading since May 2021. Since the November 2024 election, there has been a marked shift in producers' attitudes toward large investments. From May through October 2024, the index averaged just 36, while the average from November through April grew to 54 — a 50% increase from the previous six months. This month, one out of four producers said it was a good time to make large investments, nearly twice the percentage of respondents who said it was a good time to invest when surveyed from May through October last year.

Despite a rise in investment sentiment, nearly two-thirds of producers in



April's survey still said it was a bad time to invest, suggesting persistent caution among a majority of U.S. farmers. That group's outlook helps explain the sharp decrease in new farm equipment sales that took place during 2025's first quarter. According to the Association of Equipment Manufacturers, sales of tractors with over...

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