

Market **OUTLOOK**

Week 4: January 19-25, 2026



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Market **ALERT**

Berries
Broccoli
Brussels Sprouts
Carrots
Celery
Cilantro
Citrus
Green Onions
Mushrooms
Onions
Peppers Chili
Pineapples
Squash

transportation

Nat'l Diesel Avg: \$3.459↓

Last Year: \$3.602↑

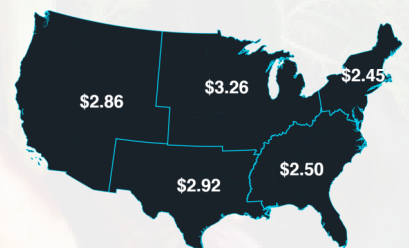
Nat'l Fuel Surcharge: \$0.40

Shortages: Rates are easing

- extreme - CA
- slight - AZ, FL & TX

National Posted Rate per mile

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



weather **OUTLOOK**

Oxnard, CA: Sunny and cloudy skies with highs in the 60s and 70s and lows in the 50s.

Salinas, CA: Cloudy and sunny skies with highs in the mid 60s to low 70s and lows in the 40s.

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

Immokalee, FL: Sunny and cloudy skies with highs in the low 70s to 80s and lows in the 40s to 60s with PM thunderstorms on Thursday.

Idaho Falls, ID: Sunny and cloudy skies with highs in the 30s and lows in the teens and 20s.



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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



Markets remain steady as increasing Mexican production and ongoing Peruvian imports create an oversupply, keeping prices flat. Warm weather is boosting Mexican yields and extending the season. Despite past climate-driven instability in Peru, current supply is stable with no quality issues. Ample volume is expected through late January with no disruptions anticipated.

avocados



Supply is exceptionally strong, supported by Mexico's projected record 2.5B lb. 2025–2026 season. Preferred sizes are abundant with promotable volume, strong quality, and favorable growing conditions. Markets are steady at lower levels. Brief holiday harvesting slowdowns have not affected overall availability. Reliability remains high through January and beyond.

bananas



Supplies remain steady with reliable shipping and balanced markets, and both demand and pricing are holding stable with no disruptions anticipated. Overall quality is good, though some cosmetic

issues—such as scarring and blemishes—may appear in the coming weeks as longer transit times and variable weather influence the fruit.

beans



Green Beans: National conditions are mixed, with steady markets and slight regional firmness. Florida remains moderately supplied with stable demand. The East shows solid volume and fair to good movement, while the West holds moderate supply with more variable quality that merits attention. No shortages are expected.

berries



Blackberries: Production continues in Mexico with good availability and overall good quality. Some soft fruit and red cell/color reversion are occurring due to recent heat, rain, and humidity in growing regions.

Blueberries: **ALERT** Production continues in Mexico, but supplies are tightening as crops move past peak volumes. Quality and sizing remain strong, and Mexican product are performing noticeably better than offshore offerings currently in the market.

Raspberries: **ALERT** Production continues in Mexico, but supplies have tightened as crops decline from seasonal peak levels. Overall quality is good, though some soft or overripe fruit is occurring due to recent heat, rain, and humidity in the growing regions.

Strawberries: Oxnard and Santa Maria's summer-planted fall crop is winding down, while the fall-planted spring crop is beginning and will support a steady winter supply. Quality is strong, and volume should improve with warm, dry conditions. Baja Mexico is seeing increases in both conventional and organic production under favorable weather. Central Mexico remains steady but is easing off peak volumes, with good



Market UPDATE

berries cont...



quality. Florida production is down roughly 50% due to cool temperatures, and the upcoming freeze/frost will keep volumes limited.

broccoli



Broccoli: Supplies remain light as Yuma continues to work through quality issues from fall rain. Demand has strengthened, and limited volume is expected to continue into next week. Quality is only fair, though dry weather ahead should support gradual improvement in both quality and availability.

Broccolini: **ALERT** Supplies are steady with increased demand. Market pricing remains elevated, and yields are expected to remain steady for the next few weeks.

brussels sprouts



EXTREME Supplies remain extremely short with fair quality. Availability will increase slowly in coming weeks, though Mexico's supply is behind this season and quality challenges continue to pressure volume. Only gradual improvement is expected, with supplies likely staying below normal for two more weeks until transitioning fully to the new Mexico growing region.

cabbages



Supplies continue to improve with better yields and quality. Demand has decreased, and market pricing has improved. Quality is good, and supplies should continue strengthening over the next few weeks.

carrots



The U.S. carrot market remains industry-wide

tight due to unprecedented rain and cold conditions in California, particularly in the Bakersfield growing region, which have significantly impacted harvest conditions and yields. Recent storms have caused further delays, increased crop loss, and ongoing prorations. California is currently extremely limited in larger-size carrots (Tables and Jumbos), with an anticipated four-week gap that could extend longer, reflecting broader industry-wide shortages. Supply pressure will persist through the end of the Bakersfield season as production shifts to the Imperial Valley in mid-February, where early conditions look favorable but still carry risk. Planning ahead is advised, along with considering substitution options such as cello, large baby, or multi-pack formats as availability gradually improves.

cauliflower



Supplies are light as demand increased, and limited volume is expected for the next few weeks. Quality is only fair with some head yellowing, and pricing is active with additional firmness likely next week.

celery



EXTREME Supplies will remain very light as demand continues to increase. Additional regions will begin harvesting over the next few weeks, but pricing is expected to remain escalated until more product becomes available out of Yuma.

citrus



Limes: Markets are volatile and tightening heading into Q1 during the industry's "Reset" period—characterized by scarcity, speculative buying, and Mexico-driven constraints. Lower flowering in Veracruz is limiting volume. Peru and Columbia can supplement but cannot match



Market UPDATE

citrus cont...



Mexico's consistency. Tightening will peak mid to late January as 150s dry out and smaller sizes strengthen. Added strain from weather, crime-related packing disruptions, and Mexican supply-chain interruptions will keep pricing elevated and supplies unstable through at least weeks 6–7.

Lemons: California supplies are strong with good quality and steady demand. Harvest levels vary by region—District 1 is roughly 25% harvested, District 3 about 85%, and District 2 is increasing activity. Peak sizes are 115s–165s. While earlier weather slowed growth on larger sizes, overall availability remains solid. Longer-term coastal pressures persist but aren't affecting near-term foodservice sizing.

Oranges: **ALERT** California Navels continue to face a severe shortage of small sizes (88s/113s/138s). Fog, intermittent rains, and uneven sunlight pushed fruit toward larger counts, and pack-outs are further reduced by fruit drop, puffing, and increased sorting. Large fruit (56s/72s) is plentiful with strong sugars. Small-size improvement is not expected this season or into Valencia transition. Recommend substituting Cara Caras or mandarins where small navels are required.

cucumbers



Supplies are primarily concentrated in Mexico, especially Sinaloa, with good quality and limited production elsewhere. Output is anticipated to increase within 7–10 days as temperatures warm.

grapes



Global pricing is stabilizing as varietal differentiation becomes clearer, though premium greens remain under pressure, and West Coast shortages are driving localized tightness. Peru

continues as the main supply source, with Chilean volumes ramping up to support availability, though varietal imbalances persist. Pricing is steady for reds and blacks, while greens face upward pressure, and West Coast markets are seeing premiums due to constrained supply.

herbs



Markets are elevated due to recent weather-related production slowdowns that have tightened supply. Quality remains good, but reduced output is driving higher prices and limiting flexibility. Tight conditions are expected until fields recover and weather stabilizes.

Cilantro: **ALERT** Supplies remain light with fair quality and steady demand from Oxnard and Mexico. Market pricing has increased due to regional transitions and higher demand, and light supplies with escalated pricing should continue for the next few weeks.

kale



Supplies have improved with steady demand. Quality is fair and should remain steady, with product now shipping from Oxnard and Yuma. Market pricing is stable.

lettuce



Green & Red Leaf: Supplies remain good with steady demand. Quality, sizing, and weights have improved, and market pricing has eased. With no rain in the forecast, supplies and quality should continue to improve.

Iceberg: Supplies are steady with increased demand. Quality and weights are expected to be fair. Market pricing has improved, and with no rain expected, both supply and quality should continue trending upward.

Romaine: Supplies are steady with increased



Market UPDATE

lettuce cont...



demand. Quality and weights are expected to be fair. Market pricing has improved, and dry conditions will support supply and quality.

Tender Leaf: Supplies are lighter following earlier field-level quality issues, though improvement is expected ahead. Pricing remains unstable with limited volume, but dry weather should support gradual gains in both supply and quality.

melons



Cantaloupe: Supplies are improving as production shifts from Zacapa to two new regions that are helping stabilize availability. Sizing is mainly 9s with some jumbos and 12s. Quality is strong, with firm fruit, slightly greener exteriors, and excellent internal quality.

Honeydew: Demand continues to exceed supply, though relief is expected as new Guatemalan fruit arrives at Florida ports. Production is mainly 5s and 6s, with some jumbos and limited 8s. Supply should gradually improve, but the market will remain tight in the near term.

mushrooms



Supplies are very limited, and demand has increased. Quality is fair. Growers are dealing with gnat infestations. Colder weather should help reduce the gnat population, but this issue is expected to persist for several weeks.

onions



RADAR Supplies remain strong with good quality. Overall pricing is slightly below last year. Market prices on white continue to increase along with yellow. Medium reds are also constrained due to a heavier run of jumbo sizes.

onions green



EXTREME Supplies remain very limited, a trend expected to continue for several weeks. Pricing will stay elevated as demand strengthens, and quality is only fair. Tight supply and firm markets are likely to persist.

pears



Washington's 2025 crop is rebounding after a difficult 2024 season, supported by excellent bloom, minimal frost impact, and strong, uniform sizing. Early projections indicate production could surpass 400,000 tons, returning to pre-2022 levels due to favorable spring weather and improved orchard management.

peppers bell



Plentiful supplies out of Mexico, with strong quality, full sizing, and stable overall volume. Supplies are expected to remain robust despite minor short-term regional fluctuations.

peppers chili



Supplies continue to tighten, with Florida and Sinaloa serving as the primary production regions. Jalapeños remain steady, while other varieties are lighter. Overall availability is good except for orange habaneros and tomatillos, both of which are expected to improve over the next two weeks.

pineapples



RADAR Early signs of market tightening are emerging, though conditions remain stable for now. Quality is good, but sizing may become more variable in the coming weeks, so flexibility on size selection will be important as the market develops.



Market UPDATE

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



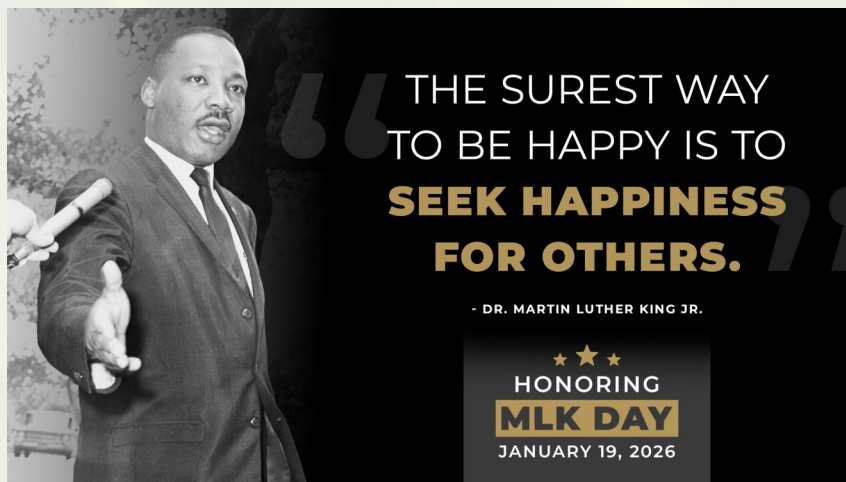
RADAR Availability remains tight for the next 7-10 days due to seasonally light production and cool, wet weather. Florida volumes are modest, with good overall quality—zucchini showing stronger performance than yellow—and improved pack-outs from Immokalee. Western supplies are extremely tight, particularly on

zucchini, as delayed crops progress; gradual improvement is expected as growing conditions normalize.

tomatoes



Supplies are seasonally lighter due to reduced acreage and cooler temperatures, but overall availability remains adequate with strong quality. Florida production is steady but light across romas, rounds, and grapes, with sizing varying by harvest stage and larger fruit coming from crown picks. In Mexico, supplies are moderate and improving as West Mexico ramps up and Baja winds down; rounds are sizing up, and grape volumes are led by Culiacán. Some quality variability persists, but favorable weather should support continued improvement and amore consistent supply ahead.





Market UPDATE

in the news...

New evergreen cherry tree could revolutionize stone fruit production in warmer climates

Macarena Bravo | January 14, 2026 | Freshfruitportal.com

After new study by researchers at the Center for Agri-Food Research and Technology of Aragon (CITA) in Spain and the Spanish National Research Council (CSIC) showed that a promising evergreen cherry tree has been developed for breeding and research. The cultivar is unique within the species, since it doesn't enter winter dormancy and maintains active growth throughout the year.

The breakthrough was developed by Ana Wünsch, Senior Researcher at the Department of Plant Science at CITA, and Afif Hedhly, an ARAID Foundation researcher at the Aula Dei Experimental Station (EEAD-CSIC).

CITA emphasized that this cultivar is a key tool for agricultural research, as it will allow for a deeper understanding of the regulation of seasonal growth and the adaptation of stone fruit trees to temperate climates, a growing

challenge for the sector.

An evergreen cherry tree that defies temperature

Cherry trees, like other stone fruit trees, require winter chill to induce flowering and ensure production. However, the decrease in chilling hours due to climate change is affecting productivity across different regions, driving the development of new adaptation strategies.

In this context, the evergreen cherry tree will allow researchers to study the genetic and molecular mechanisms that control winter dormancy. This will advance the development of varieties more adapted to warm regions, subsequently expanding cultivation zones.

The cultivar was obtained through traditional plant breeding techniques and is the result of years of research



led by Wünsch.

Currently, doctoral candidate and researcher Nerea Martínez-Romera is working on the physiological and molecular characterization of the evergreen cherry tree as part of her...

[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