

# Market OUTLOOK

Week 3: January 12-18, 2026



Market ALERT

**Broccolini**  
**Brussels Sprouts**  
**Celery**  
**Cilantro**  
**Green Onions**  
**Mushrooms**  
**Onions**  
**Raspberries**  
**Chili Peppers**  
**Pineapples**

## *transportation*

**Nat'l Diesel Avg: \$3.477**

Last Year: \$3.561 ↑

**Nat'l Fuel Surcharge: \$0.42**

## **Shortages:** Rates are stable to slightly easing

- **extreme** - AZ & TX
  - **slight** - FL

### National Posted Rate per mile

previous week's average outbound reefer rate for each region  
Map from DAT



## weather OUTLOOK

**Oxnard, CA:** Mostly sunny skies with highs in the 70s and lows in the 50s

**Salinas, CA:** Partly cloudy and sunny skies with highs in the 70s 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 and possible showers with highs in the upper 70s and lows in the 40s and 50s.

**Idaho Falls, ID:** Partly cloudy and sunny skies with highs in the 30s and lows in the teens.



# 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 tight, especially for XL and Jumbo. Cooler weather in Peru and transitional gaps in Mexico are pushing yields toward smaller fruit. Production in Baja and Sonora is low, and Peru continues to decline with seasonal and quality challenges. Elevated markets and limited premium sizes are expected for the next 2-3 weeks, with standard-size substitutions common until Mexico ramps up later in January.

## avocados



Mexico's Aventajada and Loca crops are overlapping, ensuring strong supply and market stability. Larger sizes dominate the size curve, and inventories are well managed. Pricing remains favorable with strong promotional opportunities. Continued market stability is expected through early February.

## 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:** Mexican production remains stable, with Florida adding light volume. Demand is firm on winter menus, and overall quality is good despite some scarring and size variation. The market should stay steady, though cooler weather may slightly slow growth in Mexico. No major disruptions are expected.

## berries



**Blackberries:** Quality is fair, with minor leakage—typically one or two drupelets per berry—and very little soft fruit. Supplies are tapering off their seasonal peak, but Mexico continues to send solid volume, helping maintain overall availability.

**Blueberries:** Mexico's volumes remain strong and continue to increase, while offshore fruit from Chile is arriving steadily, helping maintain an adequate overall supply.

**Raspberries:** **ALERT** Supplies remain steady but are beginning to trend down as the seasonal peak passes. Mexico continues to send good volume, and overall quality is solid, with only occasional soft or overripe fruit and minimal leakage.

**Strawberries:** Oxnard is recovering from recent heavy rains, with damaged fruit being cleaned up. With no rain in the forecast, supplies are expected to improve as conditions stabilize. Mexico's volumes continue to build as they approach their mid-January peak, while Florida is gaining momentum after a slow, cool start. Overall availability is strong, and both Mexico and Florida are delivering consistently good quality.



# Market UPDATE

## broccoli



**Broccoli:** Supplies are on budget. Growers continue to face quality issues at the field level due to previous rain in Yuma. Demand has increased, and supplies are expected to remain steady over the next few weeks. Overall quality is fair, but with no rain in the forecast, conditions should gradually improve and help maintain stable supply levels.

**Broccolini:** **ALERT** Supplies remain light as demand continues to increase. Market pricing has leveled off somewhat but is still elevated, and yields are expected to improve over the next few weeks.

## brussels sprouts



**EXTREME** Supplies remain extremely short, and overall quality is only fair, with added quality challenges further tightening availability. Mexico's regions are running behind schedule, keeping supplies very limited for the next few weeks. Slow improvement is expected, but volumes will likely stay below normal for two to three weeks until the transition into new Mexican growing regions is complete.

## cabbages



Supplies continue to improve, with better yields and quality reported in Yuma. Demand has decreased, and market pricing has improved, with contract pricing returning to normal. Quality is good, and supplies should continue improving.

## carrots



Harvest conditions are favorable, quality is consistent, and supplies are meeting demand. Sizing and pack-outs continue to perform well, keeping the market steady and reliable.

## cauliflower



Supplies are on budget, and demand remains strong, with steady availability expected in the coming weeks. Quality is fair, while market pricing holds stable. Markets are anticipated to become more active in the near future as conditions shift.

## celery



**EXTREME** Supplies remain very light, with demand continuing to rise. Additional growing regions are expected to start soon, but market pricing will remain escalated for the next few weeks. Pricing should improve once supplies increase out of Yuma.

## citrus



**Limes:** The Mexican market is dominated by smaller fruit; larger sizes are scarce and command premiums. Recent heat and humidity have reduced pack-out yields, contributing to ongoing volatility expected through January. Colombian volumes remain limited and are not sufficient to offset Mexico's shortfalls.

**Lemons:** California's District 2 is winding down as District 3 ramps up with excellent quality fruit peaking on 140s. Smaller sizes (165s and below) remain tight. Imports have ended early, leaving limited offshore support. Elevated markets will persist through January.

**Oranges:** California is transitioning from Valencia to Navel. Early Navel picks show clean fruit peaking on 88s, though sizing remains small. Promotable volumes are expected by late January. Market conditions will remain tight until full Navel availability comes online. Quality is excellent, with strong color and very good brix levels.



# Market UPDATE

## cucumbers



New crops from Sinaloa are supporting strong Mexican supplies with good quality, while holiday-related disruptions are easing. Eastern availability remains very limited, keeping the market heavily dependent on Western and Mexican products.

## grapes



Global pricing is stabilizing as varietal differentiation becomes clearer, though premium green grapes 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 notable premiums due to constrained supply.

## herbs



Demand for fresh herbs, especially basil, continues to rise. Supply remains steady, supported by improved farming and packaging practices. Stable availability is expected through mid-January, with no significant quality concerns reported.

**Cilantro: ALERT** Supplies remain light, and quality is fair. Demand is strong. The product is shipping from Oxnard and Mexico. Market pricing has increased due to growing transitions and higher demand. Expect light supplies and elevated pricing for the next few weeks.

## kale



Supplies have improved with strong demand. Quality is fair, and supplies should remain steady

for the next few weeks. The product is shipping from Oxnard and Yuma. Market pricing is stable.

## lettuce



**Green & Red Leaf:** Supplies have improved, with steady demand. Quality, sizing, and weights have all improved. Market pricing is better, and no rain is in the forecast; conditions should continue to support further improvement.

**Iceberg:** Supplies are steady, and demand has increased. Quality and weights are expected to improve further. Market pricing is better, and dry conditions will support continued improvement.

**Romaine:** Supplies have improved, and demand is up. Quality and weights are expected to continue improving. Market pricing is better, and dry weather will help maintain progress.

**Tender Leaf:** Supplies are steady. Growers have transitioned operations and processing to Yuma. Previous quality challenges are improving, and better quality is expected next week. Market pricing has returned to normal. Dry weather should support continued improvement.

## melons



**Cantaloupe:** Supplies are improving as production shifts from Zacapa -where weather ended the season early -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 with 12-14% brix and solid flavor.

**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.

# Market UPDATE



## mushrooms



Supplies remain very limited on white and brown as demand continues to increase. Quality is fair, and growers are contending with gnat infestations that are difficult to manage due to reduced insecticide effectiveness and limited approvals. 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 due to current market conditions, and this trend is expected to continue for several weeks. Market pricing will stay escalated as demand rises. Quality is 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



Multiple Mexican regions are in production, keeping supplies in a favorable position. Quality has been strong from both new West Mexico

crops and established Jalisco programs, with good sizing and color overall. Minor greening on yellow bells has been noted but remains limited. Supplies are expected to stay strong through January.

## peppers chili



Supplies are transitioning to winter production, with South Florida replacing Plant City as the primary source. Availability is fair, but older plantings are causing lighter volumes and quality concerns, particularly on Cubanelles and jalapeños. Western supplies are stronger, with good availability on jalapeños, serranos, and anaheims. Poblano and tomatillo supplies remain light but are expected to improve within 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.

## 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 are moderate as new fields come online, with Immokalee and Homestead carrying production after Plant City wraps up. Quality is



# Market UPDATE

## squash cont...



strong on newer yellow and zucchini plantings. Western supplies are ample with Sinaloa in full production, though some discounted, quality-challenged product is present in the market.

## tomatoes



Florida supplies remain limited due to recent adverse weather, cool temperatures, and lighter

seasonal acreage, which have slowed maturity and reduced sizing. Warmer weather expected in the coming days should improve volume and sizing within 7–10 days, with Naples carrying Florida production as Labelle winds down. Mexico is also in a lighter production phase, with Baja nearing the end of its season and Central Mexico in winter mode, while West Mexico volumes are beginning to ramp up. Overall quality has been mostly good from both regions.

### commodities alert overview

**Raspberries** are trending down post-peak but remain good quality; **broccolini** is light with high demand, improving soon; **brussels sprouts** and **celery** face extreme shortages and fair quality for weeks; **cilantro** and **mushrooms** are tight with elevated pricing and quality issues; **green onions** remain very limited; **chili peppers** are transitioning with mixed quality; **onions** are strong overall but whites and reds are tight; **pineapples** stable now but may tighten soon.



# Market UPDATE



*in the news...*

## Fresh Produce Consumers Have Changed For Good

Years of disruption have reshaped how Americans shop for fresh food, turning routine purchases into more thoughtful, flexible choices.

By Edward Vernon | North American Vision Magazine

After years of volatility — from pandemic lockdowns to supply-chain shocks and the lingering effects of inflation — U.S. consumers have quietly rewritten their relationship with food.

The disruptions of the early 2020s did not just alter buying habits temporarily; they reset them. Industry experts say that what has emerged is a more fragmented and pragmatic consumer — one whose daily decisions in the grocery aisle reflect an enduring mix of caution, flexibility, and fatigue.

“Consumers today buy just what they need, when they need it,” says Jonna Parker, team lead for the Fresh Foods Group at Circana, a market research company. “They’re shopping more often, across channels, for smaller baskets and specific occasions.”

Shopping has become a series of micro-trips — sometimes online, sometimes in person, often at different retailers in a single week. For younger generations who came of age during this period, she adds, this behavior isn’t temporary.

Consumers feel busier than ever, Parker notes, even when their schedules may not objectively be so. That feeling of constant busyness, combined with years of elevated costs, has led to a deep restructuring of habits.

From an economist’s perspective, David Magaña, senior fruits and vegetables analyst at Rabobank, an agricultural lender and market research firm, sees this transition as both behavioral and structural. Over the past decade or so, there has been a major expansion in fruit availability year-round, he explains. “Imports have made once-seasonal categories like berries, avocados, and mandarins continuously present on shelves.” That constant supply has changed expectations: shoppers no longer think of certain fruits as seasonal luxuries, but as everyday essentials.

In Rabobank’s long-term data, Magaña points to the “Northeast movement” of key categories — meaning both prices and volumes have risen over time, a clear indicator of healthy, sustained demand. “For items like blueberries or avocados, we’re still seeing the demand curve shift to the right,” he says. But he also cautions that steady availability has bred a new kind of complacency. Consumers assume abundance as a given, which means loyalty must now be earned through experience, not access.

While the pandemic initially encouraged more at-home cooking, inflation later forced consumers to choose carefully where to spend — and where to save. Many are still shopping this way.



Magaña observes that discount grocers and club stores continue to gain share, even after food inflation has moderated. “Discount grocers are not giving market share back,” he says. “Consumers continue to search for value.”

For produce, this recalibration has a silver lining. Compared with most other food categories, fresh fruits and vegetables have remained relatively stable in price. Between 2019 and 2024, produce prices rose only about 18%, according to Circana, while the total food and beverage market climbed roughly twice that rate. Consumers, consciously or not, have noticed.

That combination — perceived value, healthier positioning, and...

[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 [ihoppe@nproduce.com](mailto:ihoppe@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

