

Market **OUTLOOK**

Week 12: March 16–22, 2026



Market **ALERT**

Apples
Beans
Berries
Broccoli
Carrots
Cauliflower
Celery
Citrus
Corn
Cucumbers
Green Onions
Honeydew
Peppers
Pineapples
Romaine
Squash
Tomatoes

transportation

Nat'l Diesel Avg: \$4.859↑

Last Year: \$3.582↓

Nat'l Fuel Surcharge: \$0.66

Shortages: Rates are increasing

- **extreme** - n/a
- **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: Partly cloudy and sunny skies with highs in the 70s and lows in the 50s.

Salinas, CA: Cloudy and sunny skies with highs in the 80s to 70s and lows in the 50s.

Yuma, AZ: Cloudy and sunny skies with highs in the 100s and lows in the 70s.

Immokalee, FL: Cloudy and sunny skies with highs in the upper 60s to 80s and lows in the 50s with PM thunderstorms on Monday.

Idaho Falls, ID: Cloudy with highs in the 50s to 70s and lows in the 40s.





Market UPDATE

apples



ALERT Prolonged September heat required heavy irrigation to protect tree health and maintain fruit quality, but it also pushed fruit sizes larger across the industry. Washington's Gala crop is more than 4 million boxes below last year, and current sizing is peaking on medium to large, leaving 125/138 counts in very limited supply. Markets are expected to firm, and shifting to other red varieties—such as Fuji or Pink Lady—is strongly recommended where possible. Granny Smith sizes are also running large, with 125/138 counts virtually unavailable and no comparable green variety to substitute. The variety is expected to remain at premium market levels, and customers are encouraged to plan for alternative fruits when small-size needs cannot be met.

asparagus



Domestic production is ramping up, with Mexico still driving most supply and early California volumes building. Overall availability is improving, though sizing remains inconsistent as fields shift from winter to spring growth. Jumbo and XL remain tighter than mediums. Demand has eased after early-March promotions, helping stabilize markets, but freight continues to impact delivered costs. Quality is generally strong with good color and tight tips, though some heat-related issues appear in southern regions. Pricing should remain steady as more regional volume comes online.

avocados



Mexican harvests are increasing, improving supply and providing promotable volumes, especially on 48s and 60s. Larger fruit is still somewhat limited but trending better. Demand is balanced, and quality is strong with good dry matter. The market remains favorable for features moving into late March and early April.

bananas



Supplies remain steady with reliable shipping and balanced markets. Demand and pricing are stable, and no disruptions are expected. Overall quality is good, though cosmetic issues such as scarring and blemishes may appear due to longer transit times and shifting weather conditions.

beans



Green Beans: **ALERT** Weather issues in Florida significantly reduced yields, tightening supply and pushing markets sharply higher. Mexican product is helping but not enough to fully offset gaps, especially for consistent sizing and quality. Expect ongoing allocation risk and limited spot opportunities. Quality has been variable, with more off-grade product—particularly thin beans. Conditions should begin improving later in March as Florida recovers, but near-term pressure remains high.

berries



Blackberries: Industry supply is currently light. Volumes have declined and are expected to continue tapering over the next few weeks.

Blueberries: **ALERT** Pint supplies remain good, but overall volumes are declining. Larger pack sizes will stay limited as pint production takes priority. Strong pint availability is expected to taper off soon, with lighter volumes ahead.

Raspberries: **ALERT** Baja is nearly finished for the season, leaving very light volumes. Central Mexico remains steady but is starting to decline. Supplies are expected to rebound by mid-April with the next bloom cycle.

Strawberries: California production exceeded expectations and continues to increase, offering abundant, high-quality fruit. Earlier rain damage



Market UPDATE

berries cont...



has been resolved, and growing conditions are excellent. Florida is experiencing hot, humid weather, reducing volumes, though cooler weather next week may extend the season slightly.

broccoli



Broccoli: ALERT Supplies have improved as harvesting begins in new fields. Quality is rebounding from earlier fall rain impacts in Yuma, and demand remains strong. Supplies are expected to continue improving over the next few weeks. Early production has begun in Salinas.

Broccolini: EXTREME Supplies remain extremely limited out of Yuma. Strong demand is keeping markets elevated. Expect tight supply and high pricing until the full transition to Salinas in the coming weeks.

brussels sprouts



Supplies and quality continue improving. Availability should remain strong in the coming weeks, making this a good item to promote. Market pricing is expected to stay favorable.

cabbages



Supplies remain steady with good yields and quality out of Yuma. Demand has increased slightly, while both market and contract pricing remain stable. Supplies are expected to hold steady in the coming weeks.

carrots



ALERT The market remains extremely tight as recent heavy rain and cold temperatures in California—particularly around Bakersfield—

continue to disrupt harvests, lower yields, and force prorations. Larger sizes are still unavailable. Production has shifted to the Imperial Valley, but supply remains limited while fields recover. Early outlooks there are positive, though the region still carries risk given the volume needed to offset shortfalls from Bakersfield. A 3–4 week gap is still expected before sizing and yields begin to rebound. Limited support from the Southeast provides only minor relief and is not enough to compensate for California’s shortages.

cauliflower



EXTREME Supplies remain light due to earlier weather-related quality issues and reduced yields. Current quality is fair, with increased insect pressure driven by warmer conditions in Yuma. Supplies are expected to improve in the coming weeks as harvests begin in Salinas.

celery



EXTREME Weather stress continues to affect crop performance. High demand is keeping markets elevated. Conditions should remain similar for the next few weeks, with pricing expected to ease as new growing regions come online.

citrus



Limes: RADAR Supplies are steady but remain tighter than normal due to earlier weather-related issues in Mexico, with Colombia providing some added relief. Demand is firm, keeping markets elevated. Quality is generally good, though some fruit shows lighter color and thinner skin. Sizing is leaning medium, with fewer large sizes available. Pricing is expected to stay firm through late March, with limited relief unless demand eases or additional volume enters the market.



Market UPDATE

citrus cont...



Lemons: California production is increasing with the transition into spring fruit. Supplies are improving, with smaller sizes most available and larger counts still limited. Steady demand is allowing gradual market easing. Quality is solid with good color and juice content, though some cosmetic defects persist.

Oranges: **ALERT** California Navel supplies are facing a severe shortage of small fruit as early-season fog, intermittent rains, and uneven sunlight pushed the crop heavily toward larger sizes. Small counts (88s, 113s, 138s) remain extremely limited, with no improvement expected for the rest of the Navel season or during the transition to Valencias. Fruit drop, puffing, creasing, and heavier sorting are further reducing usable pack-outs, even in well-set groves. Larger sizes (56s and 72s) are widely available with strong quality and sugars, but consistent small-size coverage will not be achievable; alternatives such as Cara Cara or mandarins are recommended when smaller fruit is required.

corn



AOG Supply remains extremely limited and is expected to stay tight for at least four more weeks, with markets holding in the low \$60s. Mexico is facing significant quality issues leading to load rejections, while Florida has very limited availability. Recent freezes may have destroyed up to 9,000 acres of Florida production, with further losses possible as assessments continue. Limited frost-protection capability contributed to widespread damage. Mexico is also seeing reduced output due to soil strain, rain, and lower yields. Prorates under Act of God clauses are likely, and backstock depletion next week may create fill gaps. Overall availability remains

critically short.

cucumbers



ALERT Eastern supplies remain extremely tight, with markets in the low \$40s as regions rely heavily on Honduras, where long transit times are affecting quality. Florida's spring crop should begin with light volume by late March and increase into April as replanted fields start producing. In the West, supply remains strained due to strong demand, with fair quality. Tight markets are expected to continue for several weeks before improving as Florida ramps up.

grapes



Pricing is beginning to stabilize, but pressure on premium green remains high, with West Coast availability issues creating pockets of tightness. Peru continues to lead supply, while increasing Chilean volumes are helping support overall availability. Even with improving flow, varietal imbalances—especially among higher-tier green grapes—persist and will continue to influence pricing in the near term.

herbs



Markets are mixed as weather volatility creates uneven supply, especially for basil and parsley. Cooler nights are slowing growth and tightening basil availability. Demand is steady, keeping pricing firm. Quality is generally good, though extended transit can shorten shelf life on more tender herbs. Conditions should gradually improve as spring weather becomes more consistent.

Cilantro: Supplies have improved with fair quality, and demand remains strong. Product is moving from both Oxnard and Mexico. Market pricing is easing and is expected to continue trending downward as volume increases.



Market UPDATE

kale



Steady supplies with good demand, and overall quality is fair. Production is coming from Oxnard and Yuma. Market pricing remains steady.

lettuce



Green & Red Leaf: Steady supplies and good demand, with product shipping from Yuma. Quality is fair, with some outer leaf issues and higher insect pressure. Sizing and weights remain fair, and both markets and supplies are expected to hold steady.

Iceberg: Supplies have strengthened, though quality is still only fair with some outer leaf issues. Markets have eased as more volume becomes available. Insect pressure remains high in warm Yuma conditions, but continued warm weather should support further supply gains and additional market softening.

Romaine: **ALERT** Supplies are steady, though some quality challenges persist, including fringe burn and elevated insect pressure. Weights are improving, and market pricing remains active. Warmer weather should help improve supplies and ease pricing as conditions stabilize.

Tender Leaf: Supplies are improving and demand is steady. Markets are easing with increased volume. Continued warm weather should support further supply and pricing improvement.

melons



Cantaloupe: Sizing is skewing larger, with smaller sizes tightening and likely to command a premium. Overall quality remains excellent with strong eating characteristics.

Honeydews: **AOG** Volumes continue to decline as fields in both Guatemala and Honduras face

significant pressure from downy mildew, which is reducing yields and producing smaller, lower-brix fruit. These challenges are expected to persist through mid- to late March, making replacements difficult and increasing the need for size flexibility—particularly on 5/5Js.

mushrooms



Supplies of white and brown varieties are light but improving, with fewer quality issues and reduced gnat pressure. The industry is moving into peak season, and both supply and quality are expected to strengthen next month.

onions



Supplies remain strong with good quality. Overall pricing is slightly below last year. Market prices are trending down on jumbo and colossal white and yellow, while reds remain steady.

onions green



EXTREME Supplies are slowly improving. Mexico remains the primary production source, and labor issues have stabilized. Expect gradual supply increases and improving markets over the next few weeks.

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 400K tons, returning to pre-2022 levels, thanks to favorable spring weather and improved orchard management.

peppers bell



ALERT Supplies are light across Central and West



Market UPDATE

peppers bell cont...



Mexico. Central Mexico's crops are finishing earlier than normal, and West Mexico is producing smaller fruit and ending its season early after heavier early green bell harvests. Early March will remain tight on both size and quality until Canadian production scales up in 3–4 weeks. Green bells, currently in the mid-\$40s, are especially constrained due to color, quality, and supply challenges, with improvement expected by late March to early April.

peppers chili



ALERT Florida supplies remain very limited following freeze damage, especially poblanos and jalapeños. Recovery is expected as South Florida ramps up in the coming weeks and Plant City restarts in mid-April. Sinaloa volumes are still low to moderate due to weather, disease, and pest pressure, and tomatillos remain particularly short with weaker husk quality. Limited volume from Central Mexico provides minimal relief, keeping overall availability tight.

pineapples



RADAR Production volumes are tightening over the coming weeks, though near-term supply remains manageable. Growers are shifting harvest dates to improve maturity and overall fruit quality. Weather continues to challenge crownless fruit, further pressuring availability. Spot market pricing is beginning to rise. Flexibility on sizing and ongoing quality monitoring are advised as conditions evolve.

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



ALERT Florida volumes remain limited following widespread cold damage, though slight improvement was seen last week. Replanted fields should gradually recover from mid- to late March. Quality is average. Mexico continues to supply a moderate zucchini volume and slowly improving yellow squash supplies, with fair to good quality despite some cosmetic issues.

tomatoes



AOG Supplies across roma, rounds, and grapes remain tight due to weather-related yield and quality issues in both Florida and Mexico, though demand has eased slightly and provided some short-term relief. Florida's frost and Mexico's ongoing quality challenges continue to limit volume, with roma and rounds especially light and grapes holding up best despite early signs of tightening. Overall, availability and quality will remain variable, and pricing may continue to fluctuate as the recent spike in roma and rounds begins to stabilize over the next few weeks.



Market UPDATE

in the news...

California Avocado Commission Celebrates Female Growers' Impact on Industry

To commemorate the International Year of the Woman Farmer, the commission is highlighting these contributions of these California growers.

The Packer Staff | March 12, 2026 | thepacker.com

Within the California avocado industry, women are playing an increasingly influential role across production, handling, sales, marketing and strategic leadership. Their expanded presence reflects a broader shift toward diversified leadership and forward-looking business practices that support reliable supply, sustainability and continued category growth for retail and foodservice partners alike.

Recognizing the growing impact of women in agriculture worldwide, the United Nations has designated 2026 as the International Year of the Woman Farmer. The U.S.-led resolution supported by 123 countries is also backed by the California Avocado Commission as part of its ongoing commitment to leadership and sustainability in the produce industry.

Further support of women's advancement across all fields was highlighted through International

Women's Day (March 8), which celebrated the social, economic, cultural and political achievements of women.

In recognition of both the International Year of the Woman Farmer and International Women's Day, CAC is highlighting a few of California's female avocado growers to showcase the role of women in the industry.

"Women are a driving force in California agriculture, serving as growers, business owners and stewards of multigenerational farms," says CAC President Ken Melban. "In the California avocado industry, female farmers play a vital role in advancing sustainable growing practices, driving operational excellence and preserving family farming legacies. Their contributions are essential to the continued growth and prosperity of our industry."



(Photo: mimagephotos, Adobe Stock)

Rachael Kimball Laenen

Rachael Kimball Laenen is the commission's current board of directors chair and the first woman to hold this position within the organization. She is the sixth generation of her family to farm in Ventura County and the fourth to nurture locally grown California...

[Read full article HERE](#)

produce in **PEAK** *for March*

Avocados	Kumquats	Potatoes
Bananas	Leeks	Spinach
Bok Choy	Lemons	Turnips
Celery	Limes	



Market UPDATE

Transition Schedule - Spring 2026

Grower ID	Grower / Shipper	Current Location	Transitioning	Commodity	Transition Dates
5240	Bengard Ranches	Yuma, AZ	Salinas, CA	Broccoli Crowns	March-17
5240	Bengard Ranches	Yuma, AZ	Salinas, CA	Cauliflower	March-18
5240	Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Iceberg	March-18
5240	Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	March-27
5240	Bengard Ranches	Yuma, AZ	Salinas, CA	Lettuce Romaine	March-27
5240	Bengard Ranches	Yuma, AZ	Salinas, CA	Celery	March-18
Huron - 3/16 - 4/10/2026					
5238	Church Brothers	Yuma, AZ	Salinas, CA	Broccoli Crowns	March-30
5238	Church Brothers	Yuma, AZ	Salinas, CA	Cauliflower	March-30
5238	Church Brothers	Yuma, AZ	Huron, CA	Lettuce Iceberg	March-30
5238	Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	April-3
5238	Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Romaine	April-6
5238	Church Brothers	Yuma, AZ	Oxnard, CA	Celery	April-9
5238	Church Brothers	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	April-9
Oxnard - 3/18 - 6/15/2026					
5246	Field Fresh Farms	Yuma, AZ	Watsonville, CA	Broccoli Crowns	March-30
5246	Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Iceberg	March-30
5246	Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Green Leaf / Red Leaf	March-30
5246	Field Fresh Farms	Yuma, AZ	Watsonville, CA	Lettuce Romaine	March-30
5246	Field Fresh Farms	Yuma, AZ	Watsonville, CA	Value Added / Processing Plant	March-30
5248	Green Gate Fresh	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	April-20
5258	River Fresh Farms	Yuma, AZ	Salinas, CA	Broccoli Crowns	April-6
5258	River Fresh Farms	Yuma, AZ	Salinas, CA	Cauliflower	April-6
5258	River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Iceberg	April-6
5258	River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Green Leaf / Red Leaf	April-6
5258	River Fresh Farms	Yuma, AZ	Salinas, CA	Lettuce Romaine	April-6
5258	River Fresh Farms	Yuma, AZ	Salinas, CA	Celery	April-6
5258	River Fresh Farms	Yuma, AZ	Salinas, CA	Value Added	April-6
5147	Taylor Farms - CA	Yuma, AZ	Salinas, CA	Value Added / Processing Plant	April-13
3739	The Salad Farm	Yuma, AZ	Hollister, CA	Value Added / Processing Plant	March-30

* Dates are tentative and are subject to change *

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!

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