

Market **OUTLOOK**

Week 13: March 23–29, 2026



Market ALERT

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

transportation

Nat'l Diesel Avg: \$5.071 **↑**

Last Year: \$3.549 **↓**

Nat'l Fuel Surcharge: \$0.69

Shortages: Rates are increasing

- **extreme** - n/a
- **slight** - 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 with highs in the 70s and lows in the 50s.

Salinas, CA: Sunny and cloudy with highs in the 70s and lows in the 50s.

Yuma, AZ: Sunny and cloudy with highs in the low 100s and lows in the 60s.

Immokalee, FL: Sunny, cloudy with PM thunderstorms and showers throughout the week with highs in the 80s and lows in the 60s.

Idaho Falls, ID: Cloudy and windy with highs in the 60s and 70s and lows in the 20s to 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



The market remains firm as Mexican volumes sit at or just past their peak and begin a gradual seasonal decline heading into April. Demand is strengthening ahead of Easter, keeping supplies tight and limiting promotional opportunities. Offshore quality remains inconsistent, especially from Peru, where weather-related delays and missed shipments are further tightening availability. Domestic regions have not yet added meaningful supply, with Washington and Michigan still several weeks from ramp-up. Sizing continues to lean toward standard and large, with very limited jumbo.

avocados



The market remains supported by strong Mexican production, with volume increasing and quality holding very well. Larger sizes, especially 48s and up, dominate availability, while smaller fruit stays limited. Demand has eased slightly after recent seasonal highs, allowing pricing to stabilize.

California fruit is present but contributes only modestly to total supply. Ample volume is expected to continue into early April, with size distribution continuing to favor larger counts.

bananas



Supply remains steady with reliable shipping and well-balanced conditions. Availability continues to meet demand, and pricing is holding stable with no disruptions expected in the near term.

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: ALERT The seasonal decline continues until Georgia starts up in late May, and demand is exceeding supplies.

Blueberries: ALERT Imports continue to decline, and volumes will keep tightening. Cool temps in Florida and Georgia are slowing progress. Chile is nearly finished, leaving light volume from Peru and Mexico. Supplies will remain short until domestic production ramps up in early May.

Raspberries: ALERT Baja is officially finished for the season. Central Mexico's volume continues to decline, and the next increase has been pushed to May. Demand is exceeding available supplies.



Market UPDATE

berries cont...



Strawberries: Warmer weather is boosting production, and volumes should exceed estimates again. Florida and Central Mexico are finished, with light harvest starting in Watsonville and Salinas next week. Good volume is expected in the months ahead. Organic supplies remain light but should improve by mid-April as northern regions begin harvesting.

broccoli



Broccoli: Supplies are holding steady, supported by improving field quality. Demand continues to run high. Harvest is starting in Salinas while Yuma rapidly approaches the end of its season. Steady supplies should continue as Salinas ramps up in the coming weeks.

Broccolini: **EXTREME** Supplies are improving, but demand remains strong. Product is available from Salinas and Yuma, with a full transition to Salinas expected in the coming weeks. Markets should continue to firm as volume builds.

brussels sprouts



Supplies are holding steady with improving quality. Availability should continue to build in the coming weeks, supporting strong promotional opportunities. Markets are expected to remain favorable as consistent supplies carry forward.

cabbages



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

carrots



ALERT The market is showing steady improvement, with production now centered in Coachella and the Imperial Valley. Warmer temperatures, including recent heat, are helping crops size up and boosting yields, supporting a gradual recovery. Fill rates—especially on baby-peeled items—are improving and should continue to strengthen over the next couple of weeks. Cello and jumbo remain very limited, as sizing is still the main constraint across the industry. An earlier-than-usual transition into Salinas could help bring additional balance to supply, but full normalization will take time as sizing and yields continue to rebound.

cauliflower



ALERT Supplies and quality are improving, though warmer Yuma weather is increasing insect pressure. Salinas has begun light production, and supplies should continue to improve over the next few weeks.

celery



ALERT Supplies are gradually improving, but strong demand is still holding markets at elevated levels. The transition will move from Yuma to Oxnard before shifting fully into Salinas. With new regions beginning to start up, growers expect supplies and market conditions to improve steadily over the next few weeks.

citrus



Limes: **ALERT** The market remains highly volatile, with reduced volume out of Veracruz tightening supply and driving prices higher across most sizes. Quality is inconsistent and availability remains limited, increasing reliance on Colombian fruit to help meet demand. Even with



Market UPDATE

citrus cont...



offshore support, total supply is still below normal, keeping the market firm. Elevated markets are expected to persist into early April, with limited relief until Mexican production improves or offshore volume increases more substantially.

Lemons: California production is active again following earlier weather delays, with the market showing a pronounced lean toward larger sizes. Small fruit remains limited and difficult to cover. Quality is mixed, with some cosmetic issues present, though the internal condition is generally sound. Size pressure is expected to continue in the near term as fruit on the trees keeps sizing up, offering little relief on smaller counts.

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



RADAR Supply continues to improve as import volume builds, bringing more stable availability across most varieties. Red grapes remain well balanced, supported by consistent supply, solid quality, and steady pricing that is keeping movement reliable. Green grapes are tightening as demand exceeds supply, pressuring prices and limiting availability of top-grade fruit. Quality across all varieties remains good overall, with consistent eating characteristics.

herbs



The market is steady but remains sensitive due to light overall supply and ongoing weather pressure across California, Florida, Mexico, and Colombia. Most items are available, though



Market UPDATE

herb cont...



volumes are lean, and intermittent gaps continue in parsley and dill. Quality is generally acceptable, but tender herbs are showing shorter shelf life as fluctuating temperatures and transit conditions add stress. Demand is stable, which is helping prevent sharp price movement. Conditions are expected to stay balanced but tight, with any weather disruption likely to create short-term supply issues.

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.

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 improved, though quality remains only fair with some outer-leaf issues. Markets have softened slightly as additional volume becomes available with the start of Huron. Warmer weather in Yuma is contributing to higher insect pressure and mixed quality. With warmer conditions ahead, supplies and market pricing are expected to continue improving.

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 have improved, and demand is holding steady. Markets have adjusted as additional volume becomes available for current orders. With warmer weather ahead, supplies are expected to continue strengthening, and market pricing should gradually improve as new production comes online.

melons



Cantaloupe: Supply remains steady overall, with availability holding consistent and quality performing well. Sizing continues to skew toward larger fruit, while smaller sizes may still carry a premium. Quality remains strong, with good internal condition and consistent eating characteristics.

Honeydews: **ALERT** Relief is expected to begin as arrivals improve. While the market has been tight, incoming supply should help ease pressure and strengthen availability in the near term. Quality remains strong, with good internal condition and consistent eating characteristics.

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.



Market UPDATE

onions green



ALERT Supplies are improving, supported by steady production out of Mexico, which remains the primary growing region. With labor now normal, availability is slowly increasing. Over the next few weeks, both supplies and market conditions are expected to improve.

peppers bell



ALERT Supplies are light across Central and West 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 Supply remains in focus heading into the Easter demand period. Quality is strong, but early indicators point to tightening availability. Production is likely to stay somewhat constrained, with continued sizing variability and

limited crownless fruit. Spot pricing is beginning to trend upward as demand increases.

potatoes



Idaho russets are now shipping from storage, with this season's crop showing improved quality and a stronger size profile. Larger sizes are more readily available compared to last year. Market pricing is steady, supported by ample supplies, creating favorable promotional conditions.

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 romas, rounds, and grapes remain tight as weather-related yield and quality issues persist in Florida and Mexico. Demand has eased slightly, but overall volume is still tight. Frost damage in Florida and ongoing quality challenges in Mexico are keeping romas and rounds especially light, while grapes remain the most stable item, though early signs of tightening are emerging. Availability and quality will continue to vary, and pricing may fluctuate as recent spikes in romas and rounds gradually settle over the coming weeks.



Market UPDATE

in the news...

Heavy rains disrupt Chile's critical late grape harvest

Macarena Bravo | March 19, 2026 | freshfruitportal.com

Heavy, localized rainfall in key Chilean fruit regions has disrupted harvesting and raised quality concerns for late-season table grapes and other crops. Potential implications for the United States import programs that rely on end-of-season volume are yet to be assessed.

Growers reported up to 1.4 inches of rain in parts of the O'Higgins Region during active harvest windows, creating uneven but significant impacts across orchards. The timing coincides with a period when Chilean exporters typically push volume to international markets.

Víctor Catán, president of the National Federation of Fruit Producers (Fedefruta), told FreshFruitPortal.com that rainfall varied widely across production areas.

"We have areas where up to 36 millimeters of rain fell, such as San Vicente, while in other municipalities, virtually no precipitation was recorded.

This creates different impacts, but equally significant ones," he noted.

Catán said rainfall in the range of about 1.2 to 1.4 inches can directly affect fruit quality. "The fruit gets wet both externally and internally, which increases the risk of disease and shortens its shelf life. Even when preventive or curative measures are applied, there is always some degree of damage," he stated.

Grape quality, packouts under pressure

Industry sources say the impact on late table grapes will depend on variety and harvest timing, but the rains have already forced operational adjustments in vineyards and packinghouses.

"Some varieties are more resistant than others. The recommendation is not to prolong storage and to move quickly with packing and marketing," Catán said.

Rafael Rodríguez, president of the



Chilean grape research commission Uvanova, said rainfall affected roughly half of the Colchagua province in O'Higgins, including key production zones such as San Vicente and areas near Rapel. However, he noted a more limited impact in the Metropolitan Region due to the smaller area under cultivation.

Rodríguez said the industry has not yet quantified losses, as large volumes remained unharvested at the....

[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
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
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

Huron - 3/16 - 4/10/2026

Oxnard - 3/18 - 6/15/2026

* 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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