

Market **OUTLOOK**

Week 14: March 30–April 5, 2026



Market ALERT

Apples
Beans
Berries
Carrots
Citrus
Corn
Cucumbers
Grapes
Peppers
Pineapples
Squash
Tomatoes

transportation

Nat'l Diesel Avg: \$5.375↑

Last Year: \$3.567↓

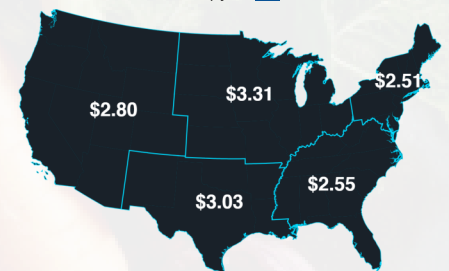
Nat'l Fuel Surcharge: \$0.75

Shortages: Freight market is very tight

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

National Posted Rate per mile

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



weather **OUTLOOK**

Oxnard, CA: Cloudy and sunny skies with highs in the upper 60s and 70s and lows in the 50s.

Salinas, CA: Cloudy and sunny skies with highs in the 60s and 70s and lows in the 40s and 50s with AM showers on Thursday.

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

Immokalee, FL: Cloudy, 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 50s to 60s and lows in the 20s and 30s.



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 under heavy pressure heading into next week as Mexican production declines earlier than normal, with heat reducing yields, sizing, and quality. Supply cannot meet demand, especially with Easter pull approaching, keeping prices high and availability inconsistent. Offshore volumes are minimal and offer little relief. California has started but remains early and unable to offset Mexico's drop. Markets are expected to stay firm through early April, with relief tied to domestic production ramp-up.

avocados



Supplies remain strong, with Mexico providing ample volume and excellent internal quality. Larger sizes dominate, while small fruit is relatively limited. Demand has normalized, keeping markets stable. California fruit remains a small contributor. Ample supplies and steady markets are expected through early April, with sizing 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 Volumes remain very light with a slight decrease from last week. Supply is expected to stay flat for the next few weeks, with no meaningful increase anticipated until May.

Blueberries: ALERT Import volumes continue to decline as Chile winds down. Supply will rely on lighter Peruvian volumes and steady production from Central Mexico. Florida is expected to increase slightly but remains very light, with most marketers only offering pallet quantities. Jumbo-sized fruit continues to shrink as the import season winds down.

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.

Strawberries: Production is expected to improve, though recent heat has slowed volumes. Northern



Market UPDATE

berries cont...



areas are now projected to begin with only light pallet movement. Southern regions will see more fruit discarded due to sun damage. As conditions stabilize, stronger output is anticipated, supporting promotional activity. Organic supply remains steady from Central Mexico, with light availability from Santa Maria.

broccoli



Broccoli: Supplies are steady with improving quality, and demand remains high. Salinas is underway while Yuma winds down. Overall availability should remain consistent as Salinas production continues to increase.

Broccolini: Supplies have improved, though demand remains high. A transition to Salinas is expected in a few weeks. Product currently available from both Salinas and Yuma. Markets should continue improving.

brussels sprouts



Supplies and quality are steady and improving. Expect strong availability and favorable pricing for the next few weeks—ideal for promotion.

cabbages



Supplies are steady with good yields and quality from Yuma. Demand is up, but market and contract pricing remain stable. Supplies should remain 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



Supplies and quality have improved. Warmer conditions in Yuma have increased insect pressure, and early production has begun in Salinas. Availability is expected to continue improving in the coming weeks.

celery



Supplies are improving, though strong demand is keeping markets firm. Pricing is expected to ease as production shifts from Yuma to Oxnard and then to Salinas. Additional regional starts should help support more balanced markets.

citrus



Limes: ALERT Markets remain extremely tight. Reduced Veracruz volumes, strong demand, and ongoing heat are limiting availability and keeping prices elevated. Colombia is supplementing Mexico, but overall volume is still below normal and quality varies. Tight, elevated markets with size and supply challenges are expected through early to mid-April.

Lemons: California production is active but remains heavy toward larger sizes, leaving small fruit scarce. District transitions continue, with desert areas winding down and coastal regions slowly increasing. Quality is mixed, though internal condition is generally solid. Demand is



Market UPDATE

citrus cont...



steady and markets remain firm. Size imbalances are expected to persist into April until new-crop sizing improves.

Oranges: **ALERT** California Navels continue to face a significant shortage of small fruit, as early-season fog, intermittent rain, and uneven sunlight pushed the crop toward larger sizes. Small counts (88s, 113s, and 138s) remain extremely limited, with no meaningful improvement expected through the remainder of the Navel season or the transition to Valencias. Fruit drop, puffing, creasing, and heavier sorting are further reducing usable pack-outs. Larger sizes (56s and 72s) remain plentiful with strong quality and sugars, but consistent small-size coverage will not be achievable. When smaller fruit is needed, options such as Cara Cara or mandarins are recommended.

corn



AOG Supplies are expected to remain extremely limited for the next 3–4 weeks. Mexico continues to face significant quality issues leading to load rejections, while Florida has minimal product. The recent freeze may have destroyed up to 9,000 acres of Florida corn, with ongoing field assessments likely to reveal additional loss. Growing conditions and stalk height prevented effective frost protection, resulting in widespread damage. Mexico is also seeing reduced availability due to strained soil conditions, rain, and lower production. Prorates may occur under Act of God clauses, and depleted backstock next week could create fill gaps.

cucumbers



ALERT Eastern supplies remain very tight, with heavy reliance on Honduras, where long transit

times continue to affect quality. Florida's spring crop has started with light volume and will gradually increase through April as replanted fields come online. In the West, supply is strained due to strong demand, with fair quality available. Overall availability is expected to remain tight for the next few weeks, with improvement as Florida ramps up.

grapes



RADAR Supply continues to strengthen as import volume builds, creating more stable availability across most varieties. Reds remain well balanced with consistent supply, solid quality, and steady pricing that supports reliable movement. Greens are tightening as demand outpaces supply, pressuring prices and limiting top-grade availability. Overall quality remains strong with consistent eating characteristics across all varieties.

herbs



Markets remain steady but tight, with light supplies across several items due to recent weather swings and heat affecting California, Mexico, and Florida. Core herbs are available, though parsley and basil continue to experience intermittent shortages. Overall quality is good, but heat is reducing shelf life on more delicate items. Markets should stay generally balanced, though still sensitive to any new weather disruptions.

Cilantro: Supplies are steady with fair quality. Product now shipping from Oxnard and Mexico. Improved supplies have eased pricing, with continued improvement expected.



Market UPDATE

kale



Supplies are steady with good demand and fair quality. Shipping from Oxnard and Yuma. Markets remain stable.

lettuce



Green & Red Leaf: Supplies and demand remain steady with fair quality. Shipping continues out of Yuma, though some outer-leaf issues and elevated insect pressure persist. Overall market conditions are holding firm.

Iceberg: Supplies have improved, though quality is only fair due to outer-leaf issues and insect pressure. Markets have softened with added volume from Huron. Warmer weather should support supply and price improvement.

Romaine: Supplies are steady, though quality challenges such as fringe burn and insect pressure persist. Weights are improving, and the market remains active but is expected to ease.

Tender Leaf: Supplies have improved alongside steady demand. Warmer weather has increased insect pressure, but processors are transitioning to Salinas, which should help strengthen availability and support more favorable pricing.

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: Supplies are beginning to improve, with trends indicating better availability and more stable pricing in the coming weeks. This

follows a period of extremely tight supply driven by seasonal transitions, weather disruptions, and quality challenges across Central American growing regions.

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



The market remains firm, with yellows showing steady availability and strong quality, reds holding stable, and whites still tight with elevated pricing. Overall quality is solid. The industry will begin transitioning to Texas, New Mexico, California, and Arizona in mid-April, which should gradually improve availability. Vidalia onions will begin packing on April 13 in Georgia.

onions green



Supplies are trending upward, supported by steady production out of Mexico, which remains the primary year-round growing region. With labor now stabilized, availability is gradually increasing. Over the next few weeks, both supply levels and overall market conditions are expected to continue improving.

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.



Market UPDATE

peppers bell



ALERT Supplies remain light across Central and West Mexico. Some Central Mexico crops finished in early, while West Mexico is producing smaller sizes and ending earlier than expected due to heavier green bell harvests earlier in the cycle. Early April will remain tight on size and quality until Canadian production increases in 3–4 weeks. Green bells are particularly challenged with ongoing coloration, quality, and supply issues. Improvement is expected by mid-April.

peppers chili



ALERT Florida supplies remain limited following freeze damage, especially on poblanos and jalapeños. Relief is expected as South Florida production increases in the coming weeks and Plant City restarts in mid-April. Sinaloa volumes remain low to moderate due to weather, disease pressure, and pests. Tomatillos are especially short with weak husked quality. Light central Mexico production offers only minimal support, so overall availability will remain 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 supplies remain limited following widespread cold damage, though volume is improving week over week as replanted fields recover. Quality is average. In the West, Mexico is providing moderate zucchini volume and increasing yellow squash availability, with fair to good quality despite some cosmetic issues. Markets have largely returned to normal pricing.

tomatoes



AOG Supplies remain tight across all tomato types due to weather-related yield and quality issues in both Florida and Mexico. Demand is beginning to increase again after last week's dip. Florida frost damage and Mexican quality challenges continue to restrict volume, with romas and rounds especially limited and grape tomatoes becoming more elevated. Availability and quality will remain variable, and pricing may fluctuate, though the recent spike on romas and rounds should begin stabilizing in the coming weeks.



Market UPDATE

in the news...

University of Florida freeze-defying avocados prove their worth by surviving recent cold snap

March 25, 2026 | freshfruitportal.com

Heavy, University of Florida (UF) tree fruit breeding experts have been working for over 20 years to develop a cold- and anthracnose-resistant avocado for North-Central Florida growers. The goal is to create a Mexican Hass hybrid that withstands the region's freezing temperatures and resists the fungal disease, while allowing for commercial growth.

Their lineup of plants faced its first real cold-hardiness challenge in December 2022, when an Arctic blast delivered Florida's coldest Christmas in three decades.

However, the cold snap that hit the Sunshine State in January 2026, bringing freezing temperatures down as low as 17 degrees Fahrenheit, put the project to the test.

The university's cold-hardy lines selected four years ago faced their biggest challenge to date—and some of them passed with flying colors.

A silver lining in Florida's recent extreme cold weather

Freezing weather, such as the one recorded in Florida in February was disastrous for many. Some blueberry growers in the state saw 100 percent losses due to an unprecedented dip in temperatures.

"To open avocado production up north, you need avocados that are cold resistant, and West Indian Guatemalan hybrids that are grown in South Florida are cold tender," said Jose Chaparro, associate professor of horticultural sciences and a tree fruit breeding expert at the University of Florida.



He explained that this year was a good opportunity to assess the material's cold tolerance. After the cold snap, Chaparro says, breeders classified their avocado plants into cold-resistant tiers, categorizing them as highly susceptible, moderately or medium-resistant, or highly resistant.

[Read full article HERE](#)



Carrot Facts!



1. Carrots weren't always orange

The very first cultivated carrots were purple or yellow. Orange carrots were developed in the 16th-17th century in Netherlands.



2. Carrots are one of the only vegetables that get sweeter when cooked

Heat breaks down their cell walls, releasing natural sugars.



3. Carrot tops are edible

Carrot greens taste a bit like parsley and make great pesto, chimichurri, or salad garnish.



Market UPDATE

Transition Schedule - Spring 2026

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

Oxnard - 3/18 - 6/15/2026

Huron - 3/16 - 4/10/2026

Huron - 3/16 - 4/10/2026

*** 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!

Your Dedicated NPC Powered by Foodbuy Staff

