

# Market **OUTLOOK**

Week 11: Mar 9– Mar 15, 2026



**Market ALERT**

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

## transportation

Nat'l Diesel Avg: \$3.897↑

Last Year: \$3.635↓

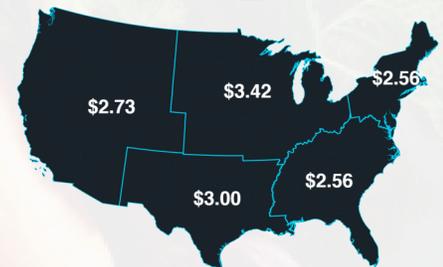
Nat'l Fuel Surcharge: \$0.48

Shortages: Rates are flat

- extreme - n/a
- slight - n/a

### 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:** Partly cloudy and sunny skies with highs in the 60s and 70s and lows in the 40s and 50s.

**Yuma, AZ:** Cloudy and sunny skies with highs in the 70s to 90s and lows in the 50s and 60s.

**Immokalee, FL:** Cloudy and sunny skies with some thunderstorms with highs in the 80s and 90s and lows in the 60s.

**Idaho Falls, ID:** Partly cloudy and windy with highs in the 40s and 50s and lows in the 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



**RADAR** Markets remain elevated and volatile heading into mid-March. Mexican production is still working through a regional gap, with some areas running lighter and later than expected, keeping supplies tight. Demand is steady, but limited volume has prevented any meaningful price relief. Quality is generally good, though sizing—especially on larger sizes—has been inconsistent. Short-term improvement is expected as new fields begin harvesting, but the increase will be gradual. Market sensitivity is likely to continue through the first half of March.

## avocados



Supply has stabilized with strong availability on larger fruit, while smaller sizes are tightening as harvest seasons shift. Demand is balanced, keeping prices steady, though size spreads are widening. Quality remains strong, with good maturity and internal condition. As spring approaches, sizing is expected to trend smaller.

Overall, this remains one of the more manageable categories in the current market.

## bananas



Supplies are steady with reliable shipping and balanced markets. Demand and pricing remain stable, with no disruptions expected. Quality is good overall, but watch for cosmetic issues like scarring and blemishes in the coming weeks due to longer transit and variable weather.

## beans



**Green Beans:** **ALERT** Supplies remain very limited this week. Recent weather disruptions in Florida sharply reduced yields, tightening availability and pushing markets higher. Mexico is helping fill some gaps, but volumes are not enough to meet full demand, particularly for consistent sizing and quality. Expect continued allocation risk and minimal spot opportunities. Quality is mixed, with increased off-grade sorting, especially on thinner beans. Conditions should slowly improve later in March as Florida recovers, but near-term pressure will persist.

## berries



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

**Blueberries:** **ALERT** Demand continues to exceed supply. Pints remain the strongest option, with good availability despite declining volumes. Larger pack sizes are getting tighter due to lighter inbounds. Organic volumes are dropping sharply this week and will remain light until the domestic season begins.

**Raspberries:** **ALERT** Baja is nearing the end of its season with light volume. Central Mexico remains steady but flat, with additional declines starting.



# Market UPDATE

## berries cont...



Volume is expected to rebound in mid-April as the next bloom comes on.

**Strawberries:** Central Mexico is officially finished with conventional fruit. Both coasts are ramping up in volume. Florida saw stronger numbers over the weekend and should continue that trend this week. Heat and afternoon rain could create minor challenges. Southern California also increased volume over the weekend, and favorable weather should support strong movement. Quality is good and will continue improving through March.

## broccoli



**Broccoli:** **ALERT** Supplies remain limited, though quality is improving as new fields begin harvest. Earlier issues were tied to fall rains in Yuma. Demand stays high. Supplies should gradually improve over the next few weeks, with additional production starting in Salinas soon.

**Broccolini:** **EXTREME** Supplies remain extremely limited out of Yuma. With demand exceeding supply, markets will stay elevated. Expect tight supplies and high pricing for the next few weeks.

## brussels sprouts



Supplies and quality continue to improve. Availability will increase in the coming weeks, making this a good item to promote. Markets should remain favorable.

## cabbages



Supplies and quality continue to improve, and demand has decreased. Market and contract pricing have normalized. Conditions should remain favorable 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 sized are still unavailable, and although production has now transitioned into the Imperial Valley, supply remains tight as fields recover and stabilize. Early Imperial Valley outlooks are favorable, but the region still carries risk given the pressure on supply and the volume needed to offset Bakersfield’s shortfall. 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 are still tight due to earlier weather-related quality issues and reduced yields. Current quality is fair. Warmer weather should help reduce mildew pressure. Supplies are expected to improve gradually, with Salinas starting in the coming weeks.

## celery



**EXTREME** Unusual weather patterns in Oxnard and Yuma have reduced yields and stressed crops. Demand remains steady, keeping markets elevated. Similar supply and pricing conditions are expected over the next few weeks.

## citrus



**Limes:** **RADAR** Markets continue to face price and size volatility, which is expected to persist through March. Although total volume has improved compared with earlier in the season, a surplus of larger fruit has created imbalance,



# Market UPDATE

## *citrus cont...*



leaving smaller sizes in short supply. Quality is generally acceptable, though shelf life varies by arrival. Expect ongoing sensitivity and uneven size availability in the short term.

**Lemons:** Markets are firm, particularly on smaller sizes, as domestic supplies remain limited and demand steady. Larger fruit is more available, though overall volume remains moderate. Quality is good, with strong color and solid juice content, but shippers are closely managing pack-outs to maintain consistency.

**Oranges:** **ALERT** California Navels are facing a severe shortage of small fruit as early-season fog, intermittent rains, and uneven sunlight pushed size profiles heavily toward larger counts. Small sizes—88s, 113s, and 138s—remain extremely limited, with no improvement expected through the rest 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) are readily available with strong quality and sugars, but consistent small-size coverage will not be achievable; substitutions such as Cara Caras or mandarins are recommended for smaller navels.

## *corn*



**AOG** Supply is expected to remain extremely limited for at least the next four weeks, as loads from Mexico continue to be rejected for quality issues and Florida has almost no available product; the recent freeze may have destroyed up to 9,000 acres of Florida corn—possibly more as field assessments continue—and the height of the stalks made frost protection impossible, leading to widespread losses. Mexico is also facing reduced availability due to strained soil conditions, rainfall, and lower overall production, and growers are operating under Act of God

clauses, meaning prorates are likely. While shippers are attempting to support orders based on historical averages, backstock is dwindling, and fill gaps may emerge as early as next week; overall, corn availability remains extremely scarce, with no short-term relief expected.

## *cucumbers*



**ALERT** Eastern supplies remain light as the market depends primarily on Honduras, where longer transit times are affecting quality. Florida's spring crop should begin with light volume by mid-March, building into April as replanted fields come online. In the West, supplies are moderate with good quality, though a brief semi-gap is expected next week before volumes rebound.

## *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, with parsley and several specialty herbs still tight due to weather and regional transitions. Quality is fair, though some lots show shorter shelf life from recent wet conditions. Basil and sturdier herbs remain more stable. Markets should stay firm through mid-March before easing.

**Cilantro:** **ALERT** Supplies remain light with fair quality, while strong demand continues to push markets higher. Product is now shipping from both Oxnard and Mexico, but transitions and



# Market UPDATE

## herbs cont...



demand are keeping pricing elevated. Expect limited availability and firm markets over the next few weeks.

## kale



Supplies have improved and demand is steady. Quality is fair. Product is shipping from both Oxnard and Yuma. Market pricing is stable.

## lettuce



**Green & Red Leaf:** Supplies are steady with good demand. Quality is fair, with some outer-leaf defects. Sizing and weights are average. Markets are stable and expected to remain steady.

**Iceberg:** Supplies have improved. Quality is fair, with some outer-leaf issues. Markets have eased with additional volume. Growers report mixed quality overall. Warmer weather should support improving supply and pricing.

**Romaine:** **ALERT** Supplies are steady, though some quality issues persist. Weights are trending better. Markets remain active. Warmer weather should improve both supply and pricing in the coming weeks.

**Tender Leaf:** Supplies have improved and demand is steady, allowing markets to soften with increased availability. Warmer weather should continue to support better supply and improved pricing.

## melons



**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.

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

## mushrooms



White and brown mushrooms remain in light supply, with strong demand. Quality has improved, and gnats are no longer present in packs. As the category enters peak season, expect better supply and continued quality improvements next month.

## onions



Supplies remain strong with good quality. Overall pricing is slightly below last year. Market prices for whites have decreased, while yellows and reds remain steady.

## onions green



**EXTREME** Supplies remain tight due to low yields. Mexico supplies most production, and while labor has stabilized, gaps remain from poor yields. Expect continued limited supply and elevated markets for 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.



# Market UPDATE

## peppers bell



**ALERT** Supplies remain light in both Central and West Mexico. Some Central Mexico crops will finish in early to mid-March, while West Mexico is already seeing smaller fruit and an earlier-than-normal season end due to heavier green bell harvesting. Early March will be tight on both size and quality until Canadian production ramps up in 3–4 weeks.

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.

## peppers chili



**ALERT** Florida supplies are extremely limited after freeze damage, with Cubanelles and jalapeños especially short and no significant improvement expected until South Florida starts new production in about four weeks. Plant City’s restart has been pushed to mid-April. Western supplies from Sinaloa remain low to moderate due to repeated weather issues and increased disease and pest pressure. Tomatillos are especially tight, with weaker quality on husked fruit. Light Central Mexico volume is not enough to offset shortages.

## squash



**ALERT** Florida supplies are extremely limited after widespread cold damage, with only minimal production expected for the next month. Replanted fields may begin recovering by mid-March. The remaining fruit has average quality. In the West, Mexico is providing moderate zucchini supplies and tighter yellow squash volume, with generally fair to good quality and some cosmetic defects.

## 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.

## tomatoes



**AOG** Supplies across romas, rounds, and grapes are tightening due to widespread weather impacts in Florida and Mexico. Frost in Florida has reduced yields, size, and quality, limiting relief from upcoming transitions to Estero, which also saw weather damage. Mexico is producing below expectations with ongoing quality challenges. Rounds are somewhat better supplied than romas but still light due to reduced yields and higher grade-outs. Grape tomatoes remain the strongest item, though cold-related damage and bloom drop are beginning to pressure future volume. Expect continued tight supplies and variable quality across all tomato types in the weeks ahead.

## potatoes



Idaho russets are now shipping from storage, with this season’s crop showing clear



# Market UPDATE

*in the news...*

## Diesel Prices Spike on Iran Conflict Just Ahead of Planting Season

*Strait of Hormuz disruptions and refinery attacks drive fuel costs higher as farmers face a 2026 planting season crunch.*

Michelle Rook | March 4, 2026 | [thepacker.com](http://thepacker.com)

Diesel prices spiked more than 60¢ combined on Monday and Tuesday.

It is a direct result of the supply cutoff through the Strait of Hormuz, says Alex Hodes, director of market strategy – energy with StoneX Financial Inc. Refined product movement is concentrated in the Strait, making this one of the biggest global disruptions for the oil market.

“A large amount of refined products, specifically diesel and jet fuel, transport through this Strait. That closure is causing panic in buyers of Middle Eastern diesel, one of which is Europe, which is kind of the primary maker of diesel prices globally. That’s dragging on NYMEX heating oil diesel prices as well,” Hodes says.

### Nationwide Diesel Prices Up Sharply from 2025

After rising 10.8¢/gal. on Monday, the

national average price of diesel rose another 8.1¢ Tuesday afternoon. It reached \$3.929/gal. — a rise of almost 20¢ in two days, writes Patrick DeHaan, head of petroleum analysis at GasBuddy, in a post on X.

Data from the Energy Information Administration (EIA) shows the national average diesel price on Tuesday was up 31¢/gal. from a year ago.

Meanwhile on Wednesday morning, NYMEX heating oil futures were up nearly 68¢ from Friday at \$3.26/gal. Diesel prices are based on these futures.

When compared to a year ago, NYMEX heating oil prices were up over 90¢/gal. and have risen \$1.21 since December 31.

### They Could Climb Higher

Hodes thinks there is more upside potential for diesel fuel prices.



“Yes, I think there’s still risks that are in the market and have not really come to fruition quite yet. So ultimately, with the Strait of Hormuz closure, the question will be how long will that last,” Hodes says.

Some relief may come following a Tuesday afternoon post from President Donald Trump. He ordered the U.S. Development Finance Corporation...

[Read full article HERE](#)

*produce in* **PEAK** *for March*

Apples	Carrots	Pineapples
Arugula	Grapefruit	Rhubarb
Bok Choy	Kiwi	Scallions
Cabbage	Mandarins	



# 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/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	April-9
5238	Church Brothers	Yuma, AZ	Salinas, CA	Cauliflower	April-9
5238	Church Brothers	Yuma, AZ	Huron, CA	Lettuce Iceberg	April-9
5238	Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Green/Red Leaf	April-9
5238	Church Brothers	Yuma, AZ	Salinas, CA	Lettuce Romaine	April-9
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/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/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](mailto: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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