

Market **OUTLOOK**

Week 16: April 13–April 19, 2026



Market **ALERT**

Apples
Asparagus
Beans
Berries
Broccoli
Carrots
Cauliflower
Celery
Citrus
Corn
Cucumbers
Grapes
Herbs
Peppers
Pineapples
Tomatoes

transportation

Nat'l Diesel Avg: \$5.643↑

Last Year: \$3.639↓

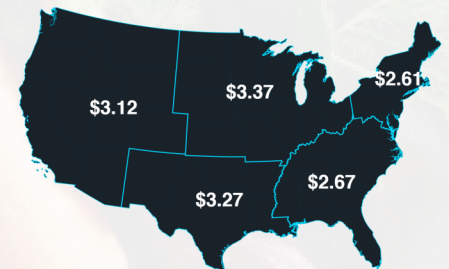
Nat'l Fuel Surcharge: \$0.80

Shortages: Freight market is very tight

- **extreme** - n/a
- **slight** - CA, 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 throughout the week with highs in the upper 60s and low 70s and lows in the 50s.

Salinas, CA: Partly cloudy with some PM sun Tuesday & Thursday with highs in the 60s and 70s and lows in the mid 40s to low 50s.

Yuma, AZ: Sunny and cloudy skies with highs in the 70s to 90s and lows in the 50s and 60s.

Immokalee, FL: Mostly sunny skies throughout the week with highs in the upper 80s and low 90s and lows in the 60s.

Idaho Falls, ID: Mostly cloudy and windy throughout the week with snow showers on Thursday with highs in the 40s and 50s 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



RADAR Supply remains under pressure as Mexican production winds down earlier than normal due to sustained heat stress, reducing yields, shortening spear length, and creating uneven quality in late Sonora fields. Production is shifting to Baja, with Central Mexico expected to add volume later in April, though current output does not yet offset northern declines. Offshore arrivals are increasing but remain inconsistent, with high freight costs limiting flexibility, especially in the Midwest and East. Quality is mixed, with dehydration and shorter shelf life noted on longer transits, particularly larger diameters. Strong seasonal demand and Easter pull are keeping markets elevated.

avocados



Supply remains favorable entering mid-April, supported by consistent crossings and strong internal quality. Size availability continues to favor medium and larger fruit, with smaller sizes more

limited. Demand has normalized after recent promotions, keeping markets steady. Short-term holiday harvest pauses may cause minor disruptions, but overall supply is sufficient. California volume is expected to build gradually into late April and May, reinforcing availability and maintaining strong eating quality.

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: RADAR Supplies remain tight in early April following earlier weather disruptions in Mexico and Florida. While new acreage is coming online, yields are inconsistent, and overall volume remains below normal. Steady retail and foodservice demand continues to limit market relief. Quality is variable, with sizing and cosmetic issues reported, particularly on hand-picked products. Pricing remains firm until production stabilizes.

berries



Blackberries: ALERT Central Mexico production continues but has moved past peak, resulting in tighter supplies. Quality remains good; however, volume relief is not expected until the first week of May.

Blueberries: ALERT Demand continues to exceed supply as Mexico moves beyond peak production. Quality and sizing remain strong, but availability is very limited. Florida volumes are expected to be light due to freeze-related crop losses. No significant volume relief is expected until early May.



Market UPDATE

berries cont...



Raspberries: **ALERT** Supplies are expected to remain limited through most of April, with potential for daily pro-rates and order cancellations. Substitutions may be used when available. Central Mexico is at its lowest production point due to pruning, with recovery expected late April to early May. Baja volumes should improve early to mid-April. Quality remains good.

Strawberries: Oxnard production is past peak, with heat impacts leading to field cleanup and declining volumes. Salinas and Watsonville volumes continue to increase week over week, with improving quality as the northern season ramps up.

broccoli



Broccoli: **ALERT** Supplies are constrained as the Yuma season has ended and Salinas production continues to ramp up. Strong demand and earlier warm weather have tightened availability, while recent cooler conditions have slowed yields. Very limited volumes are expected for the next three weeks, keeping markets elevated.

Broccolini: Supplies remain on budget despite strong demand. Production has transitioned to Salinas, with markets rising due to broader broccoli market increases. Additional increases are possible if broccoli markets continue to escalate.

brussels sprouts



Supplies are abundant with improving quality. Availability and favorable pricing are expected to remain stable for several weeks, supporting promotional activity.

cabbages



Supplies and quality remain strong in Yuma. Demand increased this week, but markets and contract pricing are stable. A gradual transition to Central California will occur over 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 are limited as Yuma has concluded, and Salinas production is just beginning. Earlier warm weather accelerated maturity, while recent cooler temperatures are reducing yields. Tight availability and elevated markets are expected to persist for the next three weeks.

celery



ALERT Supplies remain light following the transition from Yuma to Oxnard. Strong demand continues to pressure availability, with elevated pricing expected until yields improve.



Market UPDATE

citrus



Limes: ALERT The market remains extremely tight as reduced Mexican production coincides with seasonal harvest delays and holiday-related border disruptions. Lower volumes have sharply limited availability across most sizes, driving elevated markets and allocation in some channels. Colombia is supplying supplemental volume, though not enough to offset broader shortages, and logistics remain challenging. Quality is generally acceptable, but sizing is inconsistent and transit conditions require close monitoring. Tight supply and elevated pricing are expected to persist through late April, with gradual improvement possible into early May.

Lemons: RADAR California supplies are tightening as desert districts conclude harvest, increasing reliance on coastal and Central Valley fruit. Size distribution remains challenging, with ample large fruit and limited smaller counts. Reduced volume and strong seasonal demand have pushed markets higher. Quality is generally good, though sizing flexibility remains necessary. Supplies are expected to stay snug through late April, with limited near-term relief.

Oranges: ALERT California Navel season is well advanced, with tightening supplies as late-season issues emerge. Larger sizes remain more available, while small-count Navels are increasingly scarce. Quality concerns include softness, creasing, and color variation on late fruit. Early Valencias have begun in limited volume but are not yet providing meaningful relief. Navel availability is expected to continue tightening ahead of a gradual transition to Valencias later in April and May, with small sizes remaining particularly constrained.

corn



AOG Supplies are expected to remain extremely

limited for at least the next three weeks. Mexico is facing quality issues leading to load rejections, while Florida availability is minimal following freeze damage that may have affected up to 9,000 acres. Frost protection was ineffective, resulting in widespread loss. Mexico is also experiencing reduced production due to soil stress, rain, and lower yields. Prorates are possible under Act of God clauses, and backstock depletion next week may result in fill gaps. Availability is very scarce with elevated markets. This will also affect fresh-cut items.

cucumbers



AOG Supplies remain tight, particularly in the East, where availability is extremely limited and markets are elevated due to reliance on Honduras imports and ongoing quality challenges from extended transit. Western and Mexican supplies are available but below peak volumes. Florida's spring crop is beginning with light production and is expected to improve gradually over the next two weeks as April progresses. This will also affect fresh-cut items.

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. Quality remains strong with consistent characteristics across all varieties.

herbs



RADAR Warmer temperatures have increased growth but have also led to occasional shelf-life concerns, especially on delicate leaf items during



Market UPDATE

herbs cont...



transit. Demand remains steady following seasonal menu resets. Near-term conditions are mostly stable, though brief item-specific gaps may occur if heat accelerates growth faster than harvest timing can adjust.

Cilantro: Supplies are steady with fair quality. Strong demand continues, though shipping from Oxnard and Salinas has improved availability. Further supply improvement is expected.

kale



Supplies and markets are steady with good demand. Quality is fair, and product is shipping from Oxnard and Central California. Conditions are expected to remain consistent.

lettuce



Green & Red Leaf: Supplies are stable. Quality is only fair due to outer leaf issues and insect pressure from warmer Yuma conditions. Sizes and weights remain light. Improvement is unlikely until the Salinas transition is complete.

Iceberg: Supplies are limited as Yuma has finalized and Huron production winds down. Salinas will begin shipping next week. Strong demand, lighter carton weights, and lower yields are keeping markets elevated.

Romaine: Supplies are steady, but quality challenges persist, including fringe burn and insect pressure. Salinas shipments begin next week and are expected to improve weights and overall quality as production ramps up.

Tender Leaf: Supplies have improved, easing market pressure. Demand remains steady. Insect pressure continues on Yuma products, but conditions are expected to improve as

production transitions to Watsonville/Salinas.

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 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 remain light amid strong demand. Quality continues to improve, with fewer gnats being reported. As peak season approaches, 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. 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 continue to improve, primarily from Mexico. Availability trends remain positive, supporting gradual market easing.



Market UPDATE

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



AOG Supplies remain tight due to limited eastern production, slow western desert transitions, and variable Mexican quality. Colored bells are especially constrained following early season endings in Mexico, while green bells continue to show coloration and quality issues. Gradual improvement is expected in late April as desert and Canadian greenhouse volumes increase. This will also affect fresh-cut items.

peppers chili



AOG Florida supplies remain very limited following freeze damage, with poblanos, serranos, and jalapeños especially tight until South Florida ramps up and Plant City resumes in mid-April. Sinaloa volumes remain low to moderate due to weather, disease, and pest pressure, with tomatillos particularly short and husked quality weaker. Light Central Mexico production offers minimal relief, keeping overall availability tight.

pineapples



RADAR Quality is strong with tight availability. Production is likely to stay constrained, with sizing variability and limited crownless fruit. 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



Florida supplies remain limited following widespread cold damage, though volumes are improving week over week as replanted fields recover. Current quality is average. In the West, Mexico is supplying moderate zucchini volume and improving yellow squash supplies, with fair to good quality despite some cosmetic issues. Markets have returned to more normal pricing.

tomatoes



AOG Grape, Roma, and Round supplies are all running well below normal as Florida and Mexico face overlapping disease, weather, and yield challenges. Florida harvests are underway but significantly reduced, with volumes expected to remain limited through at least early May, following freeze damage, disease pressure, and ongoing quality issues. In Mexico, production is constrained as Sinaloa winds down earlier than normal and Sonora has not yet ramped up enough to offset the transition; recent rainfall and disease continue to limit reliable supply, particularly for larger sizes. Overall availability is estimated at roughly 50% below typical levels, with quality ranging from fair to average and pressures expected to increase. Supplies are projected to remain tight for several weeks, keeping markets elevated and volatile, with meaningful improvement unlikely until late April or early May. This will also affect fresh-cut items.



Market UPDATE

in the news...

Freeze aftershock: Florida tomato supply tight after winter storms

Carla Espinoza Gutiérrez | April 9, 2026 | freshfruitportal.com

In The Sunshine State has seen sunnier days. Earlier this year, an aggressive cold snap event decimated strawberry and blueberry fields, with total losses estimated at \$3.1 billion.

But berries weren't the only affected crop, as Florida's tomato supply remains constrained following back-to-back winter storms.

December 2025's Ezra and January 2026's Gianna caused widespread damage in planted areas going from the Panhandle through South Florida, said Florida Tomato Exchange (FTE) Executive Vice President Robert Guenther to FreshFruitPortal.com.

Guenther, who also acts as manager for the Florida Tomato Committee, said normal volumes are not expected to return until mid-April.

"It takes time to discover the full extent of the damage from events such as these," he noted. "We are currently experiencing the ongoing effects of the freeze, though most growers are still

able to supply their customers."

Roma shortfall

Roma tomatoes remain the most affected category, the executive explained. Round tomatoes have emerged as the variety's primary substitute, as they continue to be available in the market.

"We expect Roma supply to follow a similar recovery timeline, with availability improving from mid-April forward," he said.

Simultaneous production challenges tied to adverse weather in Florida and Mexico have further complicated sourcing decisions. This, Guenther said, goes out to show just how critical strong grower-shipper-packer relationships are in the produce industry.

"It's easy to take those relationships for granted when there is a robust supply of tomatoes in the marketplace, but when product is limited, it's



essential to have suppliers you can rely on to provide consistent product when needed," he added.

A pricing rollercoaster ahead for the Florida tomato sector

Guenther said stakeholders should expect continued volatility in the near term, as tight supplies and recovering production could eventually drive pricing fluctuations across the market.

[Read full article HERE](#)

produce in **PEAK** *for April*

Arugula	Limes	Pineapples
Beets	Mushrooms	Radishes
Cabbage	Passion Fruit	Scallions
Lemons	Pears	



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!

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