



Market ALERT

WEEK 17: April 20-26, 2026

apples



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.

reduced quality to fair, and plants are showing signs of fatigue and stress. Seasonal decline is expected to continue, with no meaningful volume relief anticipated until the first week of May.

Blueberries: Supplies remain very tight from Mexico as plants show fatigue and stress, limiting production. Pro-rates may occur, and substitutions may be necessary, including alternate labels, organic product, or different pack styles. While quality and sizing remain strong, overall availability is limited and expected to remain tight for several weeks. Florida volumes are also light due to earlier freeze damage. Organic production has begun lightly in Central CA, but no significant supply relief is expected until the first week of May.

Raspberries: Availability will remain limited for the next few weeks. Mexico has moved past peak production, with Central Mexico at its lowest volume point due to field stress and fatigue. Modest recovery is expected late April to early May. Baja production is expected to improve mid-April and may help supplies. Quality remains fair, with no real relief expected until May.

asparagus



The market remains under pressure as Mexican production continues to wind down in heat-affected regions, reducing yields and creating mixed quality—especially on larger sizing and shelf life. Shifting regional volume keeps overall availability inconsistent and markets elevated, requiring flexibility on specs. Peru is covering some gaps as volumes build, though quality variability and higher freight costs limit impact. Domestic production remains minimal, keeping supply demand-driven amid strong spring retail and foodservice activity. Conditions may slowly improve late April into early May, but meaningful relief is unlikely until multiple regions align.

broccoli



Supplies are very limited. Demand remains strong, resulting in extremely limited availability for the next several weeks. Earlier warm weather accelerated crop timing, while recent cooler conditions have slowed yields, creating a short-term supply gap. Limited volumes are expected to persist, keeping markets elevated.

berries



Blackberries: Production continues from Central Mexico, though supplies have tightened as crops move past peak production. Warmer weather has

carrots



The market continues to improve as production centers in Coachella and the Imperial Valley. Warmer temperatures are boosting yields and sizing, driving gradual recovery and improving fill



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carrots cont...



rates, especially on baby-peeled items. Cello and jumbo remain very limited due to ongoing size constraints. An earlier transition into Salinas may help balance supply, though full normalization will take time as sizing and yields continue to rebound.

cauliflower



Supplies are limited as Yuma, AZ has concluded and Salinas, CA is underway. Availability will be very tight over the next several weeks. Weather-driven maturity acceleration followed by cooler temperatures has reduced yields, resulting in a small spring transition supply gap. Tight supplies and elevated markets are expected to persist for the next three weeks.

celery



Supplies remain light following the transition from Yuma, AZ to Oxnard, CA. Demand has increased, placing continued pressure on the market. Limited availability and elevated pricing are expected to continue until yields improve.

citrus



Limes: Markets remain tight and volatile due to reduced Mexican volumes, harvest timing challenges, and ongoing logistics issues, especially on smaller counts. Larger sizes are more available, though quality is inconsistent with increased choice-grade fruit. Strong demand and limited volume from Colombia continue to keep markets elevated. Little relief is expected until production and import flows stabilize further into May.

Lemons: Supplies from California are available but challenged by size imbalance, with larger fruit dominating and smaller sizes limited. Harvest and

packing have normalized, though some lots show mixed quality from extended hang time and maturity issues. Pricing pressure remains on larger sizes, while small fruit commands premiums. Markets are expected to stay firm through late April, with sizing improvement unlikely until new crop enters later in the season.

Oranges: Navels continue to skew heavily toward larger sizes, limiting availability of small and mid-size fruit despite adequate overall volume. Quality is generally good, though advancing maturity raises shelf-life concerns. The transition toward Valencias will extend supply but will not immediately correct sizing shortages. Expect tightness on smaller sizes through the end of the Navel season as demand gradually shifts.

corn



AOG Supplies are expected to remain extremely limited for at least the next three weeks. Mexico is seeing quality issues and load rejections tied to soil stress, rain, and lower yields, while Florida volume is minimal following significant freeze damage affecting up to 9,000 acres. Prorates are possible under Act of God clauses, with backstock depletion likely to create fill gaps next week. Availability remains very scarce with elevated markets, including impacts to 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 several weeks but pressure may be felt into early May. This will also affect fresh-cut items.



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grapes



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



Supplies are generally stable, with selective tightening due to lighter offerings and regional gaps. Core items such as cilantro, parsley, mint, and dill remain available, while basil, thyme, rosemary, and oregano face lighter supplies, shorter shelf life, and higher handling risk. Steady demand has limited market softening despite some controlled-environment production gains. Quality varies by origin, and select-term pressure is expected to continue.

lettuce



Iceberg: Supplies are extremely limited. Demand remains strong, with processors seeking additional acreage due to lower yields. Carton weights are expected to be lighter than normal. Tight supplies and escalated markets are expected to continue for several weeks.

Romaine: Supplies are steady, but some volume reduction is expected due to insect pressure, though quality has improved. Markets remain elevated in response to other leaf items. Weights are expected to improve, with quality and supply conditions continuing to strengthen.

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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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.

peppers chili



AOG Florida remains extremely short after freeze damage, with Cubanelles and jalapeños especially limited and no meaningful recovery expected until new South Florida acreage starts in about four weeks. In the West, Sinaloa supplies remain low to moderate due to repeated weather disruptions and increased disease and pest pressure. Tomatillos are especially tight with weaker husked quality, and light volume from Central Mexico is not enough to ease shortages.

tomatoes



AOG Supplies remain tight across grape, roma, and round tomatoes due to ongoing production challenges in Florida and Mexico. Grape volumes are sharply reduced from disease pressure, low Florida yields, and constrained Mexican supply. Roma availability is tightening as Florida stays limited through early May and Mexico transitions early, with only brief softening this week. Round tomatoes remain light—especially larger sizes—impacted by disease, weather, and lingering freeze effects. Markets remain volatile with elevated pricing and limited relief until late April or early May.