

Market **OUTLOOK**

Week 15: April 6–April 12, 2026



Market **ALERT**

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

transportation

Nat'l Diesel Avg: \$5.401↑

Last Year: \$3.592↓

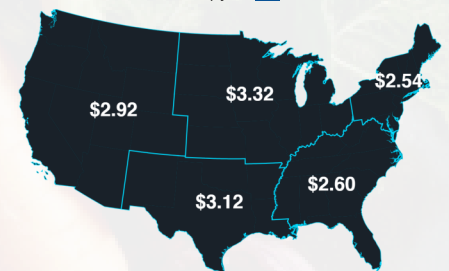
Nat'l Fuel Surcharge: \$0.75

Shortages: Freight market is very tight

- **extreme** - AZ
- **slight** - AZ, 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 lows in the 50s.

Salinas, CA: Cloudy and sunny throughout the week with highs in the upper 60s and lows in the upper 40s

Yuma, AZ: Sunny and cloudy with highs in the 80s and 90s and lows in the 50s and 60s.

Immokalee, FL: Thunderstorms and cloudy skies throughout the week with highs in the 70s and 80s and lows in the 60s.

Idaho Falls, ID: Cloudy and windy throughout the week with highs in the 50s to 70s and lows in the 30s and 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



RADAR The market remains under pressure as overall supply continues to trail demand. Mexican production is winding down faster than normal due to heat stress, impacting yields, sizing, and quality. Offshore arrivals remain light and are not providing meaningful fresh relief. California has begun harvesting but is still in the early season and not yet offsetting Mexico’s decline. Strong spring demand is keeping markets elevated, with uneven availability—especially on larger diameters. Quality is mixed, with some dehydration and shelf-life sensitivity tied to heat and transit conditions.

avocados



Availability remains strong, supported by ample Mexican supply and good internal quality. The size curve favors medium and larger fruit, with smaller sizes more limited. Demand has normalized, allowing markets to remain steady. California fruit is entering the mix but remains a

secondary contributor. Eating quality is excellent, and supplies are sufficient to meet near-term demand.

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 product. Pricing remains firm until production stabilizes.

berries



Blackberries: ALERT Supplies continue their seasonal decline, with tightening availability during the spring gap. Mexico volumes remain limited with inconsistent quality. Demand is exceeding supply, keeping markets firm. Relief isn’t expected until Georgia begins in late May.

Blueberries: ALERT Import volumes continue to decline, keeping availability tight. Cooler weather in the Southeast is slowing domestic crop progress. Chilean supplies are ending, leaving limited volumes from Peru and Mexico. Markets will remain short until U.S. production ramps up around early May.

Raspberries: ALERT Baja has finished for the season, and Central Mexico production continues to decline. Overall availability remains limited,



Market UPDATE

berries cont...



with the next production increase pushed to May. Demand continues to exceed supply, resulting in tight markets and limited promotional opportunities.

Strawberries: Supplies are tight but will loosen as additional fruit becomes available. Rain threats have diminished, with cooler temperatures midweek before warming returns late in the week. Production continues to build as Northern districts increase volume, while Southern California remains steady. Volumes are expected to rise through April, creating promotional opportunities. Watsonville/Salinas is expected to start in a few weeks.

broccoli



Broccoli: **ALERT** Supplies are steady, with improved quality reported. Demand remains strong as Yuma winds down and Salinas ramps up. Additional Salinas volume over the next few weeks should keep supplies stable.

Brocolini: Supplies continue to improve week over week, though demand remains elevated. Production has transitioned to Salinas, and market conditions are expected to ease as more volume becomes available.

brussels sprouts



Supplies are steady with improved quality. Availability is expected to increase over the next several weeks, creating strong promotional opportunities. Near-term market conditions are favorable.

cabbages



Supplies are steady with good yields and quality reported from Yuma. Demand increased this

week, while market and contract pricing remain stable. Supplies are expected to 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. Yuma is finishing while Salinas has begun shipping, and continued gains are expected as additional coastal acreage comes online.

celery



Supplies are gradually improving, though strong demand is keeping markets firm. As Yuma ends, production is shifting into Oxnard ahead of Salinas later in the season. Pricing relief is expected as new regional volume increases.

citrus



Limes: **ALERT** Supplies remain very tight due to reduced Mexican output from heat and seasonal factors. Supplemental volumes from secondary origins are helping but not fully compensating.



Market UPDATE

citrus cont...



Quality is variable, with ongoing color, sizing, and shelf-life challenges. Markets remain elevated, particularly for smaller sizes.

Lemons: **RADAR** California production is active but continues to face size challenges, with volume leaning heavily toward larger fruit and limited availability of smaller sizes. Desert production is tapering off while coastal districts build volume gradually. External quality is mixed due to weather and maturity issues, though internal quality remains acceptable. Steady demand is keeping markets firm, especially on foodservice sizes.

Oranges: **ALERT** California supplies remain constrained, with sizing heavily weighted toward larger fruit. Small and medium Navels are very limited as maturity has progressed faster than normal. Demand remains steady, keeping markets firm as buyers compete for preferred counts. Overall quality is good, but size availability remains the key constraint.

corn



AOG Supplies are expected to remain extremely limited for at least the next three weeks. Mexico is experiencing quality challenges resulting in load rejections, while Florida has minimal availability after freeze damage potentially impacted up to 9,000 acres. Frost protection was ineffective due to plant height and conditions, leading to widespread losses. Mexico is also facing reduced availability from strained soils, rain, and lower production. Prorates remain possible under Act of God clauses, and backstock depletion may create fill gaps next week. Overall availability remains extremely scarce with high market prices.

cucumbers



ALERT Eastern supplies remain extremely tight, with heavy reliance on Honduras, where extended transit times continue to impact quality. Florida's spring crop began with light volume in late March and will increase gradually through April as replanted fields come online. Western supplies are strained by demand with fair quality. Overall supply is expected to remain tight in the near term, improving as Florida ramps up and markets stabilize.

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



Weather volatility and temperature swings in key growing regions continue to limit production, keeping supplies uneven. Parsley and basil remain the most sensitive, with periodic shortages and reduced shelf life due to heat exposure during harvest and transit. Overall quality is acceptable, though tender herbs require tighter rotation to maintain freshness.

Cilantro: Supplies are steady with fair quality. Demand remains good. Product is shipping from Oxnard and Mexico. Improved availability has brought better pricing, with continued improvement expected.



Market UPDATE

kale



Supplies are steady with good demand. Quality is fair, and availability should remain stable over the next few weeks. Product is shipping from Oxnard and Yuma, with steady pricing.

lettuce



Green & Red Leaf: Supplies are steady. Quality is fair with some outer leaf challenges and insect pressure from warmer conditions. Relief is expected as Salinas production begins over the next few weeks. Markets remain stable.

Iceberg: Supplies have improved with added volume from Huron. Quality is fair, with some outer leaf and insect pressure still present. As Salinas begins in the coming weeks and weather remains favorable, markets are expected to continue stabilizing.

Romaine: Supplies are steady. Some quality issues remain, including fringe burn and insect pressure in Yuma. Weights are improving, with overall quality and supply expected to strengthen as Salinas production begins.

Tender Leaf: Supplies have improved, and markets have reacted to increased availability. Demand is steady, though warmer weather has increased insect pressure. Processors are transitioning to Watsonville/Salinas, with further supply and pricing improvement expected.

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 remain light with strong demand. Quality continues to improve, with fewer gnats reported. As peak season approaches, both supply and quality are expected to improve 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 continue to improve week over week. Availability and market pricing are expected to improve further over 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 across Central and West Mexico. Some Central Mexico crops finished in early to mid-March, while West Mexico is producing smaller fruit and ending early due to heavy green bell harvests earlier in the season. Early April will remain tight on size and quality until Canadian production ramps up in the next 3–4 weeks. Green bells are especially challenged with coloration, quality, and supply issues; improvement is expected by mid-April.

peppers chili



ALERT Florida supplies remain very limited following freeze damage, with poblanos, serranos, and jalapeños especially tight until South Florida ramps up in the coming weeks and Plant City starts mid-April. Sinaloa volumes are low to moderate due to weather, disease, and pest pressure, with tomatillos particularly short and husked quality weaker. Light production 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 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. Quality is average. In the West, Mexico is providing moderate zucchini volume and improving yellow squash supplies, with fair to good quality despite some cosmetic issues. Soft squash markets have returned to more normal pricing.

tomatoes



AOG Supplies remain tight across all varieties as Florida and Mexico face overlapping production challenges. Grape availability is estimated at roughly 50% below normal due to disease pressure, reduced yields, and declining backstock, while Mexico’s volume remains limited with only fair quality. Roma supplies are tightening further as Florida volumes stay limited through early May and Sinaloa winds down earlier than normal, with Sonora not yet producing enough to offset losses. Rounds are also running lighter than usual, particularly larger sizes, due to disease, recent rainfall in Mexico, and lingering impacts from the Florida freeze. Overall markets remain highly constrained with elevated pricing, increasing quality pressure, and no meaningful improvement expected until late April or early May.



Market UPDATE

in the news...

Preserving native pollinators can boost fruit yields, Chilean research says

Macarena Bravo | April 1, 2026 | freshfruitportal.com

In the fruit industry, the focus is often on the final product, while a critical process goes unnoticed: pollination. However, a new Chilean study is finding an unexpected correlation between native pollinators and fruit yields.

Pontifical Catholic University of Valparaíso (PUCV) researcher and agroecology professor Juan Luis Celis and his team analyzed 36 commercial apple and cherry orchards, comparing those surrounded by natural vegetation with others located in landscapes dominated almost entirely by intensive agriculture.

While the fact that pollination directly influences the quantity and quality of the fruit is hardly news, Celis' team observed that, in orchards close to natural habitats, native pollinator presence increased, and with it, fruit productivity and quality.

"Flies had already been described as good pollinators of cherry and apple

trees in countries like Germany or England, so we expected them to have a positive impact in Chile as well," he tells FreshFruitPortal.com.

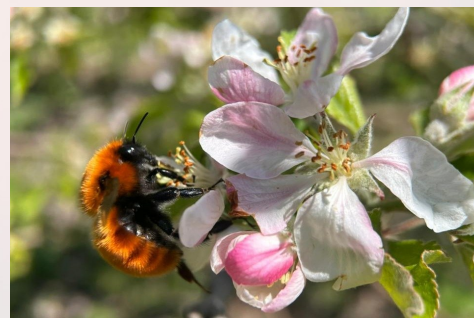
Celis notes that what really surprised them was the role of beetles, especially those in the family Melyridae. These are commonly known as the Chilean pololo and are not typically considered pollinators.

He explains that these insects, far from being occasional players, possess bristles in their legs that enable them to transport pollen as they visit cherry and apple blossoms.

The role of native vegetation

Celis says that "preserving the natural vegetation around orchards is key to allowing these pollinators to inhabit the landscape and move toward the crops".

Natural areas harbor native pollinators that move toward the orchards and promote flower fertilization. The



professor explains that these spaces generate microclimates that help maintain more stable humidity and temperature conditions, factors that also influence fruit development.

Another significant finding of the study is the so-called "edge effect." This phenomenon describes how pollinators tend to concentrate within the first few feet from the orchard's edge inward. According to the results, native pollinator presence decreases...

[Read full article HERE](#)

produce in **PEAK** *for April*

Apples	Celery	Peas
Artichokes	Kiwi	Rhubarb
Blueberries	Leeks	Turnips
Cauliflower	Mandarins	



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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