

Market **OUTLOOK**

Week 18: April 27–May 3, 2026



Market ALERT

- Apples
- Asparagus
- Berries
- Broccoli
- Carrots
- Cauliflower
- Celery
- Citrus
- Corn
- Cucumbers
- Grapes
- Herbs
- Lettuce
- Peppers
- Tomatoes

transportation

Nat'l Diesel Avg: \$5.406↓

Last Year: \$3.534↓

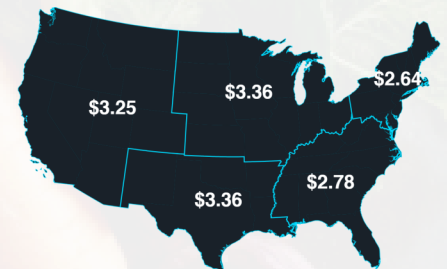
Nat'l Fuel Surcharge: \$0.75

Shortages: Freight market is flat

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

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 60s and low 70s and lows in the low to mid 50s.

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

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

Immokalee, FL: Sunny and partly cloudy with highs in the upper 80s and low 90s and lows in the 60s with PM thunderstorms on Monday.

Idaho Falls, ID: Mostly cloudy throughout the week with highs in the 50s and 60s and lows in the 30s and low 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 Market conditions remain tight as supply continues to trail demand. Mexican production is still impacted by recent heat, seasonal transitions, and quality challenges. Volume is shifting north and west, but relief remains incremental. Peru's volumes are improving during the transition window, though airfreight costs and mixed quality limit pricing flexibility. Domestic production is beginning in Washington and other western regions and should gradually improve availability in May. Until supplies normalize, markets are expected to stay elevated, with occasional prorates and size variability. Quality should stabilize as the new crop comes on.

avocados



Supplies remain ample, driven by strong and consistent Mexican volume. Shipments are running ahead of last year, with a heavy concentration of larger fruit, weighing on pricing for those sizes. California production is increasing

seasonally, adding volume with good internal quality and eating characteristics. Smaller sizes remain less consistent, but overall supply conditions are favorable heading into early May. Markets are expected to remain stable barring logistical disruptions.

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: Conditions vary by region. Eastern supplies are steady with good quality and balanced demand, keeping pricing stable to slightly lower. Western supplies remain tight due to transition gaps and acreage shifts, resulting in elevated and volatile markets. Desert production is expected to provide gradual relief. Overall demand remains solid, but availability and sizing can be uneven, especially for foodservice-preferred grades.

berries



Blackberries: Production continues out of Central Mexico, with improved supplies helping markets ease this week. Warmer weather has reduced quality to fair, and seasonal declines are expected as plants show stress and fatigue. Improved availability is anticipated once California production begins in early May.

Blueberries: **ALERT** Supplies from Mexico are tapering off as the season winds down and plants show stress. California production is increasing gradually, though meaningful volume is not expected until May. Georgia has begun new crop harvest, while Florida volumes remain light due to prior freeze damage. As California and Georgia



Market UPDATE

berries cont...



ramp up, supplies and market pricing are expected to improve.

Raspberries: ALERT Availability will remain limited for a few more weeks as Mexican supplies decline following peak season, with central Mexico at its lowest production point due to plant stress. Demand remains strong. California production is expected to begin in the coming weeks, with improved supplies anticipated by early May.

Strawberries: Production in Oxnard continues to decline, and Santa Maria supplies are lighter as the crop moves past its peak. Recent rains in central and southern CA caused harvest delays and required crews to strip damaged fruit, further reducing volumes this week, including in Salinas and Watsonville. Supplies are limited this week but are expected to improve starting next week and continue building into May as growers prepare for the next cycle. A strong opportunity to promote strawberries ahead of Mother's Day.

broccoli



Broccoli: EXTREME Supplies will be extremely limited over the next few weeks. Earlier warm weather accelerated maturity and pushed harvests forward, while recent cooler conditions have slowed availability. The next 12 days are expected to be the most challenging. The transition to central California is complete, and demand remains very strong, keeping markets at elevated levels. A short-term supply gap is anticipated, with only fair quality reported during this period.

Broccolini: ALERT Supplies will be on budget this week, with strong demand continuing. Production has transitioned to Salinas. Markets are increasing due to escalating broccoli pricing.

Overall quality is fair. Expect continued market pressure as broccoli markets reach extreme levels.

brussels sprouts



Supplies and quality are steady this week, with quality reported as fair. Availability should remain stable, presenting promotional opportunities. Pricing is expected to increase due to stronger demand.

cabbages



Supplies are steady with good yields and quality reported from Central CA. Demand increased this week, though markets and contracts remain stable. Supplies are expected to stay consistent as the transition to central CA continues.

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



EXTREME Supplies are very limited this week and will remain short for the next several weeks. Weather-driven maturity issues followed by cooler temperatures have reduced yields,



Market UPDATE

cauliflower cont...



creating an industry-wide supply gap. Quality is reported as fair. Tight supplies and extreme markets are expected for the next two 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.

citrus



Limes: RADAR The markets remain challenging, with tight supplies and most volume concentrated in larger sizes. Reduced Mexican production combined with holiday-driven demand continues to pressure availability and pricing. Supplemental volumes from alternative origins offer limited relief. Quality is generally acceptable, though color and shelf life can vary by arrival.

Lemons: RADAR California supplies remain tight, particularly on smaller sizes, as the crop continues to peak on larger counts. Strong utilization is keeping fruit moving, but small sizes remain scarce and priced at a premium. Overall quality is good, though size profiles continue to challenge certain programs. Ventura and San Joaquin volumes should increase gradually heading into late spring, but near-term markets are expected to stay firm.

Oranges: ALERT California navel supplies remain heavily skewed toward larger sizes, with small fruit extremely limited. Demand remains strong for foodservice-preferred sizes, but growers are unable to fully meet that need. Quality is mixed in some areas, with reports of softness and cosmetic issues, though internal quality remains acceptable. As navels wind down ahead of the

Valencia transition, markets remain steady to firm, and buyers should expect continued size substitutions into May.

corn



AOG Supplies are expected to remain extremely limited for at least the next three weeks. Mexico is experiencing quality issues leading to load rejections, while Florida has minimal availability. Recent freeze damage may have destroyed up to 9,000 acres of Florida corn, with losses potentially increasing as assessments continue. Mexico is also facing reduced availability due to weather, soil conditions, and lower production. Growers may prorate under Act of God clauses, and backstock depletion next week could result in filling gaps. Availability has improved slightly.

cucumbers



AOG Supplies remain tight, especially in the East, where availability has improved slightly but remains limited. Western and Mexican supplies are available but not at peak volume, and strong demand continues to support elevated markets. Florida's spring crop is starting with light volume and is expected to improve gradually, though pressure may persist into early May.

grapes



ALERT Green supplies remain tight ahead of a fuller transition to Mexican volume, while reds are firming as Chile wraps up. Quality is strong across both colors, but inventories remain sensitive. Markets are expected to stay firm until Mexican production ramps up later in May following early heat impacts.

herbs



RADAR Most supplies remain stable with steady



Market UPDATE

herbs cont...



quality, though basil continues to run tighter due to earlier weather disruptions and ongoing freight challenges. Rising diesel and logistics costs are pressuring delivered pricing, even where farm pricing is stable. Demand is seasonally strong, and greenhouse and multi-region programs are helping offset gaps. Markets are expected to remain steady but firm.

Cilantro: Supplies are steady with fair quality. Demand remains strong. Product is shipping from Oxnard and Salinas, improving availability. Continued supply improvement should support further market relief.

kale



Supplies are steady with good demand. Quality is fair, and availability should remain stable for the next few weeks. Shipping from Oxnard and central CA. Markets remain steady.

lettuce



Green & Red Leaf: ALERT Supplies are light, with only fair quality reported. Early-week rains caused harvest delays, keeping crews out of the fields for three days. Markets have strengthened in response to limited availability and increased demand.

Iceberg: EXTREME Supplies remain extremely limited as Salinas begins its seasonal harvest. Early rains caused delays and reduced field access, tightening availability. Demand is strong, with processors seeking additional acreage due to low yields, and lighter carton weights are expected. Limited supplies and elevated markets are likely to continue for the next few weeks.

Romaine: ALERT Supplies will be light as early rains delayed harvest and slowed field access.

Insect pressure is further reducing volume and contributing to fair quality. Markets remain elevated as demand continues to outpace supply, and tight conditions are expected to persist over the next few weeks.

Tender Leaf: Supplies improved this week, easing market pressure as more volume becomes available. Transitioning to central CA and the Watsonville/Salinas region should reduce insect pressure and improve quality.

melons



Cantaloupe: Supplies are in good shape with favorable harvest conditions and strong overall quality. Sizing continues to skew larger, with smaller counts tighter and carrying a premium, but overall availability remains stable.

Honeydew: Supplies are now exceeding demand as the market moves past the most challenging part of the import season. Guatemala and Honduras continue to face downy mildew pressure, impacting yields, sizing, and brix levels. Supply should remain steady until domestic Yuma production begins mid to late May.

Watermelon: The market remains well supplied with steady demand through late April and into May. Prices may continue to ease, but diversified sourcing and healthy year-to-date movement should limit volatility. The market is positioned for a smooth transition into peak domestic season, with volumes building gradually and pricing stabilizing.

mushrooms



Supplies of white and brown are light, with strong demand. Quality has improved with no gnat issues reported. Supply and quality are expected to improve next month as peak production approaches.



Market UPDATE

onions



The market is firming as the OR/ID storage season winds down, with prices trending upward due to tightening supplies and improving demand. Texas is wrapping up, and California is starting with lighter volumes, and quality is strong. New Mexico is starting mid-May. This combination is creating upward pressure on the market, especially for high-quality yellows and reds. As the transition continues, the market is expected to remain on a firmer footing, with price increases likely to persist unless new crop arrivals accelerate sharply or weather disruptions ease supply constraints.

onions green



Supplies continue to improve, primarily from Mexico. Availability trends remain positive, supporting gradual market easing.

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. Availability remains constrained as Mexico's season ended early, though conditions improved slightly week over week. Green bells continue to face color and quality challenges. Gradual improvement is underway, with moderate recovery expected late April to early May as desert, Canadian

greenhouse, and Coachella volumes increase.

peppers chili



AOG Florida supplies remain very limited following freeze damage, with poblanos, serranos, and jalapeños especially tight until South Florida and Plant City production ramps up in the coming weeks. Sinaloa volumes remain low to moderate due to weather, disease, and pest pressure. Light central Mexico production offers minimal relief, and overall availability is expected to remain tight.

pineapples



The market is showing modest tightening as April winds down. Ongoing agronomic challenges in Costa Rica—including excess rainfall, limited sunlight, and disease pressure—continue to impact yields, sizing, and exportable volume. Supply remains sufficient heading into May.

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 but 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. Markets have returned to more normal pricing.



Market UPDATE

tomatoes



AOG Supplies remain tight across grape, Roma, and round tomatoes due to production challenges in Florida and Mexico. Florida grape harvests are limited by disease and below-average yields, while Mexican supplies remain constrained with fair quality; only modest improvement is expected in the next 10 days, with stronger recovery by early

May. Roma tomatoes continue to run tight as Florida volumes stay limited through early May and Sinaloa winds down early, driving ongoing quality and pricing volatility. Round tomatoes are the most pressured, with volumes well below normal due to disease, rainfall, and lingering freeze damage, especially on larger sizes. Recovery remains clouded into late April or early May, with added demand pressure ahead of Cinco de Mayo.

in the news...

Abnormal California heat disrupts 2026 harvest rising quality concerns

Carla Espinoza Gutiérrez | April 24, 2026 | freshfruitportal.com

Early-season California heat is disrupting multiple crops, with confirmed losses and future quality concerns already weighing on producers in the Golden State. Berries, grapes, and citrus are among the most affected categories, according to regional media, company crop updates, and industry reports.

In Santa Clara County, cherry growers are struggling with sharply reduced yields after a warm winter combined with a spring heat spike during bloom. According to Gilroy Dispatch, a local news outlet in Gilroy City, orchards received about 400 chill hours, well below the up to 850 hours typically required for key varieties such as Bing. This impacts key aspects such as bud break, flowering, and fruit set.

The same report states that subsequent heat during flowering disrupted pollination, with some growers estimating yields at about five

percent of a normal crop.

In Southern California's desert production regions, a March heat wave caused significant losses in winter vegetables. According to local news channel KESQ, crops including lettuce, broccoli, and celery were damaged, with one farm reporting losses of approximately 2,500 tons.

Coastal crops are also feeling the California heat

Warmer-than-usual temperatures are also affecting berry production along the coast, where growers are reporting multiple quality issues and reduced packouts.

An early April crop update from California Giant Berry Farms notes that crews in Watsonville and Salinas are discarding a "notable amount of sunburned fruit," as well as product with deformities and overripeness.

The company also reports that in Santa Maria County, the sustained heat is contributing to soft skin and greater handling sensitivity in berries. These conditions can increase labor requirements in the field and reduce the share of fruit that meets fresh-market standards, according to the company's updates.

Tighter windows for grapes, quality concerns for citrus

California's table grape crop is advancing ahead of schedule following above-normal temperatures.

Reporting from market analyst firm Produce Market Guide shows that recent heat has pushed development 14 to 16 days earlier than average, setting up a potential record-early harvest.

However, the shift raises the likelihood of overlap with imported grapes from Chile and Peru and may compress the domestic marketing window later in...

[Read full article HERE](#)



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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