Market OUTLOOK

Week 21: May 18–24, 2026

Powered by Foodbuy

Market ALERT

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

transportation

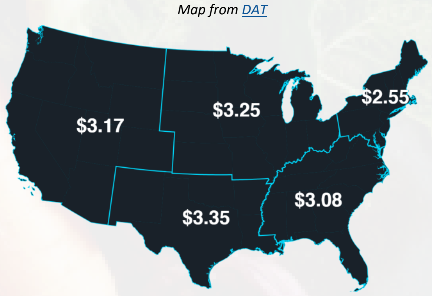
Nat'l Diesel Avg: $5.639↑
Last Year: $3.476↓
Nat'l Fuel Surcharge: $0.80
Shortages: Freight market is flat

- extreme - FL & TX
- slight - none

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 throughout the week with highs in the 60s and 70s and lows in the mid 50s.

Salinas, CA: Partly cloudy and sunny skies throughout the week with highs in the 60s and 70s and lows in the 50s.

Yuma, AZ: Sunny and partly cloudy throughout the week with highs in the 90s and lows in the 60s.

Immokalee, FL: Thunderstorm with highs in the 90s and lows in the 70s.

Idaho Falls, ID: Partly cloudy with highs in the 50s to 70s and lows in the high 20s to 40s with morning rain and snow showers on Monday.

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

ALERT Supply remains tight, keeping prices elevated as overall volume continues to trail demand. Production in Mexico has tapered off, and Central Mexico is still weeks away from providing meaningful relief. Recent heat has reduced yields and created some sizing variability, while Peru's steady but slow growth is not enough to offset current gaps, especially with limited and costly airfreight. Early domestic harvests are beginning to appear but remain too light to influence pricing. Quality is fair and improving, but tight conditions and limited promotional opportunities are expected until Central Mexico and northern regions ramp up later this month.

avocados

U.S. shipments have declined week over week, adding upward pressure on pricing. A modest shift toward smaller sizes is further tightening availability and accelerating price movement, resulting in the strongest weekly increase seen this year. Pricing was already expected to firm through May, and attention now turns to identifying how high the market may climb. Mexico's current crop is entering its late stage, with lighter volumes expected through June. While this would typically drive sharper price gains, increased contributions from California, Peru, and Colombia should help partially offset the shortfall.

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: Supplies from Mexico remain steady, though ongoing high temperatures are creating some plant and fruit stress across berry programs. Quality has seen minor impacts but is still holding up well, with growers maintaining strong pack standards and only manageable defects reported. Early domestic production is beginning, with Georgia starting limited harvests and volume expected to build. West Coast production remains light, but early fruit quality is

Market UPDATE

berries cont…

strong, with volume expected to increase in early June.

Blueberries: ALERT Mexico is beginning to slow in volume, though overall conditions remain steady with no major weather concerns aside from recent heat. Supplies are tracking as expected. Georgia and Florida experienced heavy rain and storms over the weekend—Georgia avoided major impact, while some later‑season Florida fields were rained out and are still being evaluated, delaying harvest until later this week. In California's Central Valley, volume is ramping toward peak, though labor constraints, light weather interruptions, and cooler early-week temperatures have slowed harvest slightly. Crop condition remains strong, with good sizing and quality across all pack sizes.

Raspberries: ALERT Volume is slightly increasing with steady growth expected over the next few weeks. Larger numbers remain on track for early next month, with peak production anticipated from late May into June. Mexico continues to face high temperatures, but the crop is performing well with good color, firmness, and flavor. Early harvest in Watsonville has begun with light volume and smaller early‑season sizing, though quality is strong. As Memorial Day approaches, production is expected to build steadily, and the overall quality outlook remains positive.

Strawberries: Quality remains strong, with fruit packing well and only minor defects observed. Favorable conditions in Salinas will continue to support improved quality and ripening.

broccoli

Broccoli: EXTREME Supplies will remain limited for the coming weeks as earlier warm weather created growing inconsistencies and stressed plant maturity, reducing yields. Some improvement is beginning to show as production has fully transitioned to Central California, but demand remains very strong and markets are elevated. Quality is improving overall, though volumes will stay tight with only gradual relief expected toward the end of the month.

Broccolini: ALERT Supplies remain light as strong demand and earlier weather-related inconsistencies continue to limit yields. Quality is reported as good, but availability is tight and markets are elevated due to extreme pressure on broccoli. Supplies are expected to improve gradually over the coming weeks, though higher market levels are likely to persist as broccoli remains in an escalated position.

brussels sprouts

Supplies are steady with improved quality, and availability is expected to remain stable over the next few weeks, supporting promotional opportunities. Demand is stabilizing, and both supply and pricing are projected to hold firm.

cabbages

Supplies are steady with good yields and quality out of Central California. Demand has increased, but both market and contract pricing remain stable. Supplies are expected to hold consistent as the transition into Central California continues over the coming week.

carrots

ALERT The market is showing steady improvement, with production now centered in Coachella and the Imperial Valley. Warmer temperatures are helping crops size up and boosting yields, supporting a gradual recovery. Fill rates are improving and should continue to

carrots cont...

strengthen over the next couple of weeks. Cello and jumbo remain very limited, as sizing is still the main constraint across the industry. An early 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 slowly improving as earlier warm weather created growing inconsistencies and stressed plant maturity, limiting yields. Quality has strengthened, and production has fully transitioned to Central California, but availability remains light and markets elevated. Limited volumes are expected to persist for the next few weeks, with only gradual improvement anticipated toward the end of the month.

celery

ALERT Supplies remain light for the next few weeks as strong demand continues to pressure an already tight market. Improvement isn't expected until late month when Salinas begins harvesting, which should help stabilize availability. Overall quality is fair, and elevated market conditions are expected to persist until volumes strengthen.

citrus

Limes: RADAR Markets remain volatile, though early signs of easing are emerging as additional volume begins crossing the border. Supplies, however, are still heavily weighted toward smaller sizes, keeping larger fruit limited and maintaining strong premiums. Mexican production has improved modestly, but uneven harvest patterns and quality variability continue to restrict availability of 175s and larger, while Colombia remains an important supplemental source helping stabilize overall supply. Demand is strong heading into summer, and although pricing pressure has softened slightly on smaller sizes, the overall market remains firm with size substitutions likely over the next several weeks. Buyers should plan cautiously around promotions and maintain flexibility on sizing.

Lemons: RADAR California supplies remain tight entering mid-May, with strong demand continuing to outpace available volume, particularly on smaller sizes, as the current crop is skewed toward larger fruit. Reduced acreage and uneven sizing are limiting flexibility, keeping markets firm and restricting promotional activity, especially for foodservice-driven sizes. Quality is generally good, but the imbalance between large and small fruit remains a key constraint, and meaningful relief is not expected in the near term. Imports are supplementing volume but have not materially softened conditions, keeping pricing elevated as summer demand builds.

Oranges: RADAR California Navel supplies are tightening as the season winds down, with small sizes extremely limited and pricing elevated. Remaining fruit is mostly medium to large. This is prompting sizing substitutions and elevated pricing on 113s and smaller. Late-season fruit will remain available through mid-to-late May, but inventories continue to shrink, and small sizes remain extremely limited as demand outpaces supply. Valencias are starting with good quality and early sizing also skewing larger, though overall volume is still building. The transition is keeping the citrus market firm, especially for programs needing consistent size profiles.

corn

ALERT Supply and quality continue to improve as conditions stabilize. Mexico is seeing fewer issues with better soil conditions and reduced rainfall,

corn cont...

while Georgia is beginning to ramp up with limited early volume and more availability expected over the next 10 days. Eastern production is strengthening as regional transitions progress, easing recent market pressure. Overall availability is trending upward as both regions build momentum.

cucumbers

ALERT East supply is tight with Florida finished and only light volume from Plant City and early Georgia, though additional Georgia acreage coming online soon should help stabilize availability. Quality has been fair in Florida, with Georgia expected to improve under favorable weather, and North Carolina set to begin in early June. In the West, Sonora and Sinaloa will continue supplying for several more weeks with fair-to-good quality, while Baja remains lighter but higher in quality, with more acreage expected to ramp up.

grapes

ALERT Imported supplies have mostly finished, and the market is now fully transitioning into Mexican production until California begins later this summer. Green varieties remain tighter, while red varieties are becoming more available. Quality from Mexico is generally good, though early-season variability is still being monitored. Markets should stay firm in the near term, with improved availability expected as Mexican volume peaks through late May and June.

herbs

Markets remain stable overall, though conditions vary by item. Strong demand continues to support pricing. Controlled-environment and diversified regional programs are maintaining steady availability for core items like parsley, rosemary, and thyme, though shelf life and freight pressures persist. Quality is generally good, but close attention to rotation is important as warmer temperatures increase shrink risk.

Basil: **RADAR** Supplies remain tight due to lingering early-season production challenges, and quality continues to be inconsistent.

Cilantro: Supplies are steady with fair quality, supported by strong demand and improved availability out of Oxnard and Salinas. Continued supply improvement is expected, which should help ease market pressure in the weeks ahead.

kale

Supplies are steady with good demand. Quality is reported as fair, and availability is expected to remain steady. Shipping from Oxnard and Central California, with stable pricing.

lettuce

Green & Red Leaf: **ALERT** Supplies remain light, and quality is only fair as earlier warm weather created growing inconsistencies and stressed plant maturity, limiting yields. Markets have strengthened due to tight availability and higher demand. Limited volume is expected through the end of the month, with elevated pricing likely to persist until production improves.

Iceberg: **EXTREME** Supplies remain extremely limited as recent weather fluctuations accelerated maturity earlier in the season, followed by cooler temperatures that are now reducing yields. Salinas has begun its harvest, but demand remains strong, and processors are seeking additional acreage due to lighter weights and reduced volume. Quality challenges persist,

lettuce cont...

including head abnormalities and early signs of disease. Markets remain elevated, and tight availability is expected for the next few weeks until production stabilizes.

Romaine: **EXTREME** Supplies will remain light for the next few weeks as earlier weather fluctuations accelerated maturity and current cooler temperatures continue to suppress yields. Insect pressure is easing, but overall quality remains only fair, with ongoing issues such as head abnormalities and early disease presence. Strong demand combined with limited volume is keeping markets at escalated, extreme levels, and this is expected to continue in the next few weeks.

Tender Leaf: Supplies are steady, easing market pressure as more volume becomes available. Transition to Central CA and the Watsonville/ Salinas region should improve quality.

melons

Cantaloupe: Import volume is tapering as the industry shifts toward domestic production. Quality and eating characteristics remain strong, with larger sizing still dominant and smaller counts limited. Overall availability is steady, and the transition into domestic harvest should keep supplies consistent through late May.

Honeydew: Import volumes are tapering off as the market shifts to domestic production. Offshore supply is still available, demand is softer, and supplies remain adequate. Yuma volume will increase through late May, improving availability and stabilizing the market.

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

mushrooms

Supplies have improved while demand remains strong. Quality has also improved. The market is entering peak production, with strong supply and good quality expected over the coming months.

onions

The market is strengthening as OR/ID storage winds down, tightening supplies and pushing prices upward. Texas is finishing, while California is starting with lighter but strong‑quality volume, and New Mexico has just begun. This mix is creating upward pressure, especially on high‑quality yellows and reds. As the transition continues, the market is expected to stay firm, with price increases likely unless new‑crop volume accelerates or weather‑related constraints ease.

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

ALERT Eastern bell supply is tight, with very limited XL sizes as Florida finishes and Plant City contributes only light volume. Georgia has just begun with early crown picks showing mostly

peppers bell cont...

larger sizes, with availability expected to improve in the coming weeks. In the West, Coachella is producing light to moderate volume with good quality, while Baja remains limited, and Bakersfield is set to begin in June, creating a brief overlap with Coachella.

peppers chili

ALERT Eastern chili pepper supply is improving as Plant City becomes the primary source, though poblanos and tomatillos remain unavailable and habaneros are limited, with South Florida winding down ahead of Georgia’s start in a few weeks. Mexico continues to run light on anaheims, poblanos, and serranos with mixed quality, while jalapeños show the most stability. Baja and California are just starting and should help build volume—especially on serranos and poblanos—as their seasons progress.

pineapples

Market remains balanced, with Costa Rica facing weather-related challenges that are affecting yields and sizing. Export volumes have improved, demand has softened, and inventories are stable. Availability should remain steady through May, with occasional sizing and quality variability possible.

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

Yellow and zucchini squash supplies remain tight on both coasts as seasonal transitions continue. The East is limited with Florida winding down and early Georgia volume coming on slowly, with improved availability expected once additional Georgia programs begin in early June. In the West, Sonora is finishing as production shifts to California, where Santa Maria and Fresno are in early harvest with light volume that should build quickly as warmer weather boosts yields.

tomatoes

Alert East grape tomato supply remains steady with improved sizing out of Ruskin/Palmetto before shifting north, while Mexico is lighter as Culiacán winds down and Baja gradually builds, supported by strong quality from central Mexico. Roma tomato production in Florida has rebounded with solid quality and sizing through May before transitioning to North Florida, South Georgia, and later summer regions, with Mexico contributing light to moderate volumes. The round tomato supply is strong in Florida with good volume and larger sizing through May before moving to South Carolina and North Florida/South Georgia, while Mexico is split between declining Sinaloa/Sonora output and Baja’s early picks, with more volume expected in June.

in the news...

Foodservice Faces Latest Enemy: Prepared Foods

George Hajjar | May 13, 2026 | foodinstitute.com

“Consumer behavior has shifted toward greater scrutiny of value rather than a decline in demand for dining out,” Erica Conte, brand director of The Food Group, told FI in a recent report evaluating the state of foodservice in today’s market.

That shift is increasingly benefiting grocers and convenience stores when it comes to food-away-from-home spending. Although there will always be a place for the dining-out experience, the margin is being threatened by a cheaper, more convenient alternative – the prepared foods sections of grocery stores.

In the past few years, grocers and convenience stores have found a compelling side stream: offering ready-to-eat meals or simple heat-and-eat solutions to appeal to modern, busy shoppers.

He explained that the service is seeing more lunch-driven traffic, with consumers frequenting in-store delis for a prepared lunch rather than a grocery trip. The evening, however, is still reserved for traditional grocery trips.

“There’s some crossover: Someone might grab a drink or a few items on their lunch visit, but the prepared food trip and the grocery trip are still largely distinct occasions,” he said.

Circana data corroborates these findings: Grocers’ deli sections grew 2.8% in dollar sales and 1.8% in unit sales in the 52 weeks ending April 19.

Prepared foods outperformed the broader deli category, experiencing a 3.6% boost to dollar sales and a 3.1% lift in unit sales volumes. This “all-day” approach is also evident in the 4.2% dollar sales bump to the morning bakery perimeter aisle over the period. These sections are growing faster than total store sales, acting as true revenue generators.

Colin Houchins, director of retail sales at Tosca, agrees with Henry’s observations that the grocery trip is more often complemented by prepared foods purchases, further contending that it could be replacing other food-away-from-home activity.

“Many shoppers are consolidating trips and picking up ready-to-eat prepared foods at the grocery store while doing their normal shopping, skipping out on traditional restaurant visits,” Houchins told FI.

This is consistent with what UNFI president of fresh, Ron Selders, told FI at the start of the year in a story about produce being grocers’ 2026 winning strategy.

Selders noted how a fresh-first...

Read full article HERE

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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