

Market **OUTLOOK**

Week 22: May 25–31, 2026



Market ALERT

- Apples
- Asparagus
- Avocados
- Basil
- Berries
- Broccoli
- Carrots
- Celery
- Citrus
- Cucumbers
- Grapes
- Lettuce
- Melons
- Peppers
- Squash

transportation

Nat'l Diesel Avg: \$5.596↓

Last Year: \$3.536↓

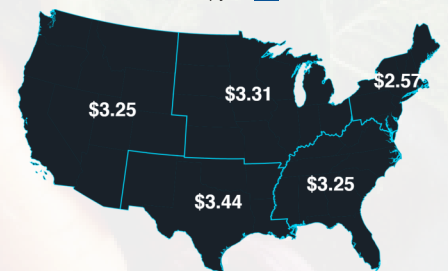
Nat'l Fuel Surcharge: \$0.79

Shortages: Freight market is elevated.

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

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 50s.

Salinas, CA: Partly cloudy and sunny skies with highs in the 60s and 70s and lows in the 40s and 50s.

Yuma, AZ: Sunny skies all week with highs in the 90s and lows in the 60s.

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

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 60s, 70s and 80s and lows in the 40s and 50s.



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



ALERT Markets are easing but remain elevated due to supply gaps between Mexico and domestic regions. Production has been inconsistent, keeping availability tighter than normal. Supplies should build with new volume from Mexico, Michigan, Canada, and Peru, improving fill rates into early June. Quality is variable but acceptable. Expect gradual supply improvement and easing prices, with continued sensitivity to weather and regional ramp-ups.

avocados



RADAR Supply remains promotable but has tightened slightly due to slower Mexico harvests. Larger sizes dominate, while smaller fruit is tighter. Quality is strong with excellent maturity. Expect steady supply through early summer as Peru ramps up, with occasional firming tied to harvest pace or logistics.

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: Mexico supply remains steady, though heat stress is emerging; quality is still holding with minor, manageable defects. Domestic season is starting—Georgia has light volume now with growth ahead. West Coast production is minimal but quality is strong; volumes should ramp up in early June.

Blueberries: Mexico is winding down. Georgia and California delivered solid volumes this week, with lighter supply expected next week. Central CA harvest is ramping slowly due to labor and minor weather delays. Overall crop condition remains strong.

Raspberries: **ALERT** Volumes are gradually improving, with peak expected late May–June. Mexico heat persists but raspberries remain resilient with good quality. Watsonville harvest has started light with smaller early sizing. Strong quality outlook as volumes build.



Market UPDATE

berries cont...



Strawberries: Santa Maria weather is stable—cooling later this week, then steady next week. Quality remains strong with active field oversight. Salinas shows similar trends, with favorable conditions expected to support continued quality and ripening.

broccoli



Broccoli: **EXTREME** Supplies improved as crops recover from prior weather inconsistency. Availability will continue to increase from Salinas and Santa Maria. Demand remains strong, keeping markets elevated, though quality is improving.

Broccolini: Supplies improved this week while demand remains high. Pricing has eased with better availability. Quality is good, and supplies and markets should continue improving over the next few weeks.

brussels sprouts



Supplies and quality are stable. Availability should remain steady, supporting promotional opportunities. Pricing is expected to hold steady as demand stabilizes.

cabbages



Supplies and quality are good from Central CA. Demand is up, but pricing remains stable. Supplies should stay consistent during the regional transition.

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 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



Supplies and quality have improved despite prior weather-related inconsistencies. Product is shipping from Salinas and Santa Maria, CA. Expect continued improvement in supply and markets in the coming weeks.

celery



ALERT Supplies remain light with elevated demand continuing to pressure the market. Improvement is not expected until early June with the Salinas start. Quality is fair. Expect limited availability and higher pricing in the near term.

citrus



Limes: **RADAR** Supply is improving with increased Mexico crossings, though still heavily weighted toward smaller sizes. Larger counts remain limited, requiring substitutions. Colombia is helping supplement supply. Expect continued volume improvement and easing pricing, but ongoing size challenges and some volatility in the near term.

Lemons: **RADAR** Supply remains tight with elevated pricing, driven by limited smaller sizes and a larger fruit profile. Production is concentrated in coastal regions with supplemental inland volume. Quality is good, but sizing challenges persist. Expect continued



Market UPDATE

citrus cont...



tightness and imbalance until later summer.

Oranges: ALERT Transition from Navels to Valencias is underway, with supply steady but skewed toward larger sizes. Smaller fruit remains tight. Some quality concerns (heat impacts, peel texture, regreening) are emerging. Expect variability during the transition, with gradual stabilization later in summer.

corn



Supply and quality continue to improve week over week. Mexico is seeing better growing conditions and fewer quality issues, while Georgia is ramping up. Regional transitions and improved Eastern production are helping ease market pressure.

cucumbers



ALERT Supplies remain tight due to a difficult Florida-to-Georgia transition. Georgia is light but improving, with additional relief expected in 7–10 days and North Carolina starting in early June. Western regions are transitioning, with Baja just starting and building. Quality is generally acceptable, led by strong Baja product.

grapes



ALERT Market conditions remain largely unchanged into late May. Both green and red grapes have fully transitioned to Mexican supply. Quality is good, but inventories remain tight, and markets are expected to stay firm until June.

herbs



Demand remains strong across channels. Supplies are steady, supported by multiple growing

regions. Pricing is mostly steady but slightly elevated on tighter items. Expect strong demand with stable supply on most herbs.

Basil: ALERT Supplies remain tight due to weather-related disruptions. Pricing is slightly elevated and expected to be constrained in the short-term.

Cilantro: Supplies are steady with fair quality and strong demand. Improved availability from Oxnard and Salinas is helping ease the market, with further improvement expected.

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: EXTREME Supplies remain very limited with only fair quality due to prior weather stress and INSV pressure. Yields are low, driving extreme pricing. Limited supply is expected through month-end.

Iceberg: ALERT Supplies remain light with ongoing quality and yield challenges from weather and early INSV. Weights are below normal and demand is strong. Markets will stay elevated with limited availability over the next few weeks.

Romaine: EXTREME Light supplies, fair quality, and strong demand continue due to weather issues and INSV. Lower yields and lighter weights are driving extreme pricing. Tight supply is expected for the next few weeks.

Tender Leaf: Supplies are steady with improving quality as production shifts to Central CA. Reduced insect pressure is expected, easing overall market conditions.



Market UPDATE

melons



Cantaloupe: **ALERT** Arizona production started more than two weeks early due to elevated growing temperatures. Harvests began strong with larger sizing, but an expected production gap is now emerging, tightening supply and helping stabilize the market. Retail demand is expected to increase after Memorial Day with major promotions, supporting the market over the next 7–14 days. The main concern is an early end to the Arizona season—projected for mid-June instead of late June—potentially creating a 7–10 day supply gap before California ramps up in late June, which could drive upward pricing pressure.

Honeydew: **ALERT** Offshore arrivals will continue next week, primarily 5/5J sizes, with some 6s and limited 8s. Yuma production has leaned toward a 5/6 count profile. Western markets are under pressure due to heavy crossings through Nogales, while elevated freight rates and truck shortages are keeping eastern markets priced higher, creating a notable regional spread.

Watermelon: The market remains well supplied heading into summer, with strong East Coast production supporting steady availability. This healthy supply should continue to ease pricing slightly.

mushrooms



Supplies and quality have improved, with strong demand. The market is entering peak production, with ample supply and good quality expected in 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



Supply is coming from Central Mexico and Canada, with strong demand favoring Canadian product due to quality. Eastern Canada is ramping after delays, while Western Canada is recovering with new harvests. Volumes should normalize in the coming days.

peppers chili



ALERT Plant City is at peak with most varieties available, though poblanos and tomatillos remain very limited. South Florida is ending while Georgia ramps up. Western supply is split across Sonora, Baja, Central Mexico, and California—overall moderate, but tight on serranos,



Market UPDATE

peppers chili cont...



poblanos, and habaneros. Baja and California are building, though poblanos will stay tight for 2–3 weeks.

pineapples



The market is showing slight tightening as we approach late May. Ongoing challenges in Costa Rica—excess rainfall, limited sunlight, and disease pressure—are affecting yields, sizing, and export volumes. Supply remains solid and should continue flowing steadily, helping ease demand pressure.

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



ALERT Eastern supply is steady but limited as Florida winds down; Georgia is off to a slow start with uneven quality but should improve in 7–10 days as more regions come online. Western supply is light, centered in Santa Maria and Fresno. Warmer weather should support increased production soon.

tomatoes



Grape tomatoes are steady out of Ruskin/ Palmetto with good quality, transitioning to South Carolina in early June, while Mexico winds down and Baja builds toward mid- to late-June. Roma production is declining in Florida with smaller sizing as the region wraps up, shifting East Coast supply to Georgia and South Carolina; Western Mexico is also winding down, with Baja volumes expected to increase by mid-June amid some Central Mexico variability. Round tomatoes remain steady in Florida with strong quality, with harvests wrapping up and transitioning smoothly to South Carolina and Quincy, while Western supply shifts from Mexico to a ramping Baja.





Market UPDATE

in the news...

How a Super El Niño Could Affect Hurricane Season

The coming weather cycle could impact hundreds of millions of people around the world.

Holliday Woodard | May 20, 2026 | [usnews.com](https://www.usnews.com)

El Niño is likely to emerge late this spring or summer and is predicted to be historically strong, according to the National Oceanic and Atmospheric Administration.

There is an 82% chance the El Niño will hit sometime between May and July and continue through the Northern Hemisphere winter and into 2027, NOAA said. NOAA will announce its predictions for the Atlantic and Pacific hurricane seasons on Thursday.

El Niño is a natural climate pattern where surface sea water temperatures in the central and eastern tropical Pacific Ocean are warmer than average, triggering a shift in trade winds.

This means that the northern U.S. and Canada are drier and warmer and the Gulf Coast and Southeast experience wetter conditions, with a higher risk of flooding.

The change causes significant shifts in global weather patterns and typically lasts nine to 12 months.

With hurricane season approaching in the coming weeks, the developing El Niño is likely to have extensive effects on rainfall, temperature and storm activity.

What Makes an El Niño "Super"?

A "super" El Niño is an extreme phase of the climate pattern. It occurs when ocean surface temperatures rise more than 2 degrees Celsius above average.

It is an expansive ocean warming that triggers extreme weather changes – droughts, floods, and spikes in global temperatures.

There is at least a 50-50 chance that the 2026 El Niño could be "super" according to The Weather Channel.

Various weather models suggest that during this El Niño, ocean

temperatures could reach 2.5 degrees above average, making it one of the most powerful on record.

"The strongest El Niño events in the historical record are characterized by significant ocean-atmosphere coupling through the summer, and it remains to be seen whether this occurs in 2026. Stronger El Niño events do not ensure strong impacts; they can only make certain impacts more likely," NOAA said.

Stronger El Niños are rare. Since 1950 there have been five "super" El Niño events. The most recent lasted from 2015-2016, according to the weather channel.

What Does El Niño Mean for Hurricane Season?

Hurricane season is just a few weeks away. The Eastern Pacific hurricane season begins May 15 and the...

[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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