

Market **OUTLOOK**

Week 20: May 11–May 17, 2026



Market ALERT

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

transportation

Nat'l Diesel Avg: \$5.640↑

Last Year: \$3.497↓

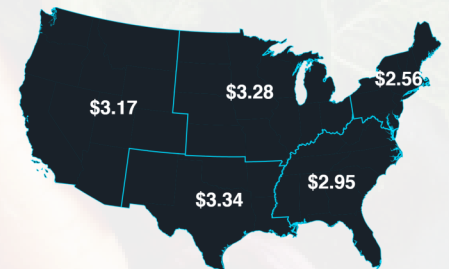
Nat'l Fuel Surcharge: \$0.80

Shortages: Freight market is flat

- extreme - FL
- 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 upper 60s and lows in the mid 50s.

Salinas, CA: Partly cloudy and sunny skies 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 100's with lows in the 60s and 70s.

Immokalee, FL: Partly cloudy and sunny skies with highs in the 90s and lows in the lower 70s with PM thunderstorms on Sunday.

Idaho Falls, ID: Partly cloudy and sunny skies throughout the week with highs in the 70s & 80's 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 The market remains tight heading into the week of 5/11 as Mexican supply recovers slowly from reduced Central Mexico volume and lingering transition gaps. Early Baja improvement has helped but has not fully rebalanced the market, keeping availability limited and prices elevated. Peruvian imports are steady but constrained by freight costs and inconsistent quality, limiting their impact, while Washington production remains minimal. Demand continues to outpace supply across foodservice and retail, with variable quality and occasional tip and sizing issues, especially on imports. Supply should improve gradually into late May, but meaningful relief is unlikely until later in the month, keeping the market firm for at least the next two weeks.

avocados



The market is well supplied heading into mid-May, supported by strong Mexican volume, rising California production, and early Peru shipments,

creating ample availability and downward price pressure. Fruit quality is very good with high dry matter and oil content, and sizing skews medium to large. Pricing has reset well below last year, and inventories remain manageable despite active promotions. As Peru ramps further alongside California's peak, markets are expected to stay loose with continued pricing pressure unless demand strengthens.

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: About 80–88% of volume is grading Fancy, while Premium has declined due to heat stress. Quality remains acceptable, with many ranches still packing meaningful Premium and Fancy fruit. Some regression is present, but defects are manageable through careful packing. Peak production is underway and expected to last two more months, supporting ample supply despite quality challenges.

Blueberries: **ALERT** Production in the Southeast is strengthening, with Georgia entering peak



Market UPDATE

berries cont...



volume, though recent rainfall (1–2 inches) temporarily slowed harvest due to saturated fields. Volumes were lighter through early week but are expected to rebound by Wednesday as conditions dry out. Additional rain could cause short-term disruptions. Despite delays, conventional supply remains stable with orders covered and a small surplus. California production is ramping up and will add supply through the week. Jumbo sizes are currently limited in the Southeast due to rain-related quality issues, but size and volume should improve toward the end of the week and into the weekend as weather stabilizes.

Raspberries: ALERT Despite continued heat in Mexico, production is performing well. Quality remains strong, with good color, firmness, and flavor across most areas. Most volume is packing into Premium and Fancy and has held up in the heat. Operations are on schedule with no major disruptions. Peak volumes are expected to build through May, supporting strong supply.

Strawberries: In Santa Maria, dry conditions over the next 7–10 days should support smooth harvests and continued quality gains, with conventional production remaining steady for two weeks before tapering in mid-May. In Salinas and Watsonville, near-term cool weather followed by warming into the low 70s should normalize harvest activity, improve quality as fields dry, and support strong fruit size across conventional and organic programs, with volumes recovering and production expected to ramp up next week toward seasonal norms and peak in May, depending on demand.

broccoli



Broccoli: EXTREME Supplies will be extremely

limited over the next few weeks. Earlier warm weather accelerated maturity, advancing harvests, while recent cooler conditions are now slowing availability. The next two weeks will be most challenging as the industry enters a supply gap. Demand remains very strong, driving markets to extreme levels. Quality is fair.

Broccoli: **ALERT** Supplies are light with strong demand, and production has fully transitioned to Salinas. Pricing is increasing in response to rising broccoli markets, and quality is currently fair. Supplies are expected to remain tight, with markets continuing to strengthen.

brussels sprouts



Supplies are steady with fair quality reported. Availability should remain stable near term, allowing for promotional opportunities. Pricing is expected to increase with higher 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 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.



Market UPDATE

cauliflower



EXTREME Supplies remain limited, driven by earlier weather-related shifts that accelerated maturity and moved harvests ahead of schedule. Cooler temperatures are now slowing availability. Some improvement is expected next week as quality strengthens, though light supplies are likely to persist for the next two weeks, keeping markets elevated.

celery



ALERT Supplies remain light following the transition from Yuma to Oxnard. Demand has increased, keeping pressure on the market. Overall quality is reported as fair. Limited availability and elevated pricing are expected over the next few weeks.

citrus



Limes: RADAR Markets remain firm as reduced Mexican production from earlier flowering disruptions keeps supply tight and prices elevated. Mexico continues to ship at below-normal volumes, increasing reliance on Colombian limes. Colombian supply is steady and increasingly important, though strong demand and higher logistics costs have limited price relief. Quality is generally good. Volatility is expected into late May, with relief dependent on improved Mexican output; until then, Colombian limes remain critical to supply.

Lemons: RADAR California supplies are adequate but constrained by reduced acreage and lingering weather impacts, affecting volume and size distribution. Larger fruit is abundant, while smaller sizes remain tight. Quality is solid and utilization strong, yet demand outpaces supply, keeping markets soft. Warming temperatures should support modest improvement in

movement, though sizing imbalances are likely to persist into early summer.

Oranges: RADAR California Navels are in the late stage of the season with declining volume and greater variability in size and internal quality. Larger fruit dominates, smaller sizes are limited, and some lots show weather-related softness or appearance issues. Demand is steady but cautious. Navel availability will continue winding down through May as the transition toward Valencias begins, resulting in a brief period of more selective supply.

corn



AOG Quality and availability continue to improve. Mexican supplies are seeing fewer quality issues, while Georgia production begins ramping over the next 10 days with limited volume. Improved Mexican growing conditions and regional transitions in the East have contributed to slight pressure relief on markets.

cucumbers



AOG Supplies have eased slightly, particularly in the West and Mexico, though availability remains limited. Western and Mexican regions are slowly approaching peak volume, allowing some demand relief. Florida's spring crop is starting with light volume and is expected to improve gradually over the next several weeks, with moderate gains by next week.

grapes



ALERT Green grapes remain tight ahead of a fuller transition to Mexican supply, while red grapes are firming as Chile wraps up. Quality is good across both colors, but inventories are sensitive. Markets are expected to stay firm until Mexican volumes ramp up later in May, following early heat impacts.



Market UPDATE

herbs



RADAR Markets are active across basil, parsley, and rosemary as seasonal menus and foodservice demand increase. Supply is generally steady, though basil remains tight following earlier weather disruptions, keeping availability constrained and prices firm compared to last year. Other core herbs are moving well with stable pricing, but warmer temperatures are pressuring shelf life and raising shrink risk. Quality is acceptable overall, though receivers are experiencing shorter windows on tender herbs. Demand should remain elevated through late spring, and basil is likely to stay volatile until production stabilizes.

Cilantro: Supplies are steady with fair quality reported, while demand remains strong. Shipping from Oxnard and Salinas, has improved availability. Continued supply improvement should support further market relief.

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, with only fair quality reported. Earlier weather accelerated maturity, while cooler temperatures are now reducing yields and creating a supply gap. Markets have responded with higher pricing.

Iceberg: EXTREME Supplies remain extremely limited, though Salinas, has started seasonal harvest. Earlier weather accelerated maturity, but cooler temperatures are now reducing yields, creating a supply gap. Demand remains strong,

with processors seeking additional acreage. Carton weights are lighter than normal, and quality issues, including head abnormalities and early signs of INSV, are being reported. Markets will remain elevated over the next few weeks.

Romaine: EXTREME Supplies are light due to earlier accelerated maturity and current cooler temperatures reducing yields, along with insect pressure. Quality is reported as fair, with head abnormalities and early signs of INSV noted. Markets remain elevated, and limited supplies are expected to persist for 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: 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: ALERT Supplies are now exceeding demand. 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

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.



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 are gradually improving after recent tightness from regional transitions and inconsistent Mexican quality, though availability remains limited following Mexico's early finish. Broader recovery is expected next week as desert, Coachella, and Canadian greenhouse volumes increase. In the East, Florida production is winding down with a smooth transition to Georgia in mid-May, supporting steady supply

into the Tennessee season in late June.

peppers chili



AOG Florida supplies remain very limited following freeze damage, with Poblano and Serrano availability especially tight until South Florida and Plant City reach full production. Central Mexico volumes continue to ease pressure week over week, with overall availability expected to improve over the next 10 days as shipments begin from Cadereyta Jiménez.

pineapples



RADAR The market is showing modest tightening entering May. 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 due to cold damage, though volumes are improving week over week as replanted fields begin producing; current 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 edged higher amid regional transitions.



Market UPDATE

tomatoes



AOG Supply conditions remain mixed but are gradually stabilizing. Florida grape tomato harvests are underway, and Mexican production continues to improve, easing the grape market as availability and demand peak. Roma supplies remain tight due to issues in Florida and Mexico,

though slightly better availability this week has helped offset limited Round supplies, with gradual improvement expected. Round tomatoes face the most pressure, with below-normal volumes—especially larger sizes—due to disease, rainfall, and lingering freeze impacts, and little relief expected before mid-May.

in the news...

Diesel Prices Are Breaking Records Across Multiple States, And Relief May Not Come in 2026

Tyne Morgan | May 6, 2026 | thepacker.com

On Tuesday, President Trump stated that high gasoline prices are a “very small price to pay” for the ongoing war with Iran, arguing they are necessary to prevent Iran from obtaining a nuclear weapon. He predicted prices will “come crashing down” once the war ends. But for farmers and ranchers, diesel prices have risen more than gas, putting a further strain on already high input costs for 2026.

To start the week, diesel prices went on another run with the national average diesel price is just 20 cents away from reaching a new all-time high. And across the country, a growing number of states aren’t waiting to get there. About six states are already seeing the national average price of diesel reach record highs.

From the Great Lakes to the West Coast, roughly a half dozen states have already smashed previous records, as a late-April dip in prices quickly faded

and a fresh surge took hold.

“Diesel now averaging about \$5.65 a gallon nationally. That is only about 20 cents away from a new all-time record high,” says Patrick De Haan, head of petroleum analysis at GasBuddy. “So even though we had that short-lived break, we’re right back knocking on the door of records again.”

That “break” didn’t last long. De Haan says even though diesel prices saw a bit of a respite for April, with even prices starting to trend down in mid-April, those prices re-accelerated in the last week.

Now, the rally is showing up in state-by-state records, especially in the Midwest.

“Looking at it state by state, Great Lakes states have seen some tremendous refining issues that have really caused prices to rise dramatically,” he says. “Michigan has

now set a new all-time record high for diesel over \$6. Indiana is just a few tenths of a penny away from setting a new all-time record. Illinois has set a new all-time record. Wisconsin has set a new all-time record.”

And it’s not just a regional story. States in the West were some of the first to not just see the highest prices, but now also hit record levels.

“Out on the West Coast, Arizona set a record a couple of weeks ago, and Washington state is at an all-time record,” he adds. “So there are probably about a half dozen or so states that have set new all-time records, and again, the national average itself is just 20 cents away.”

Perhaps the most telling shift, though, is there’s no longer a low-price...

[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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