

Market OUTLOOK

Week 29: July 13-19, 2026



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Market ALERT

Apples
Asparagus
Beans
Berries
Broccoli
Cauliflower
Citrus
Eggplant
Melons
Peppers
Potatoes
Tomatoes

transportation

Nat'l Diesel Avg: \$4.578↓

Last Year: \$3.739↑

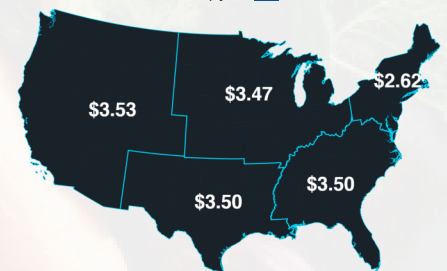
Nat'l Fuel Surcharge: \$0.61

Shortages: Freight market is easing

- extreme - GA
- slight - CA

National Posted Rate per mile

previous week's average outbound reefer rate for each region
Map from [DAT](#)



weather OUTLOOK

Oxnard, CA: Mostly sunny skies with some clouds over the weekend with highs in the 70s and 80s and lows in the 60s.

Salinas, CA: Partly cloudy skies with some sun on Wednesday with highs in the 70s and lows in the 50s and 60s.

Yuma, AZ: Sunny skies with highs in the 100s and 110s and lows in the 80s.

Immokalee, FL: Thunderstorms all week except for Monday with highs in the 90s and lows in the mid 70s.

Idaho Falls, ID: Sunny and partly cloudy skies with highs in the 80s and 90s and lows in the 50s and 60s.



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Market UPDATE

apples



RADAR Washington movement remains steady. Smaller sizes are tighter, while overall demand softens seasonally with schools out. Red Delicious inventories are down significantly year over year, making it difficult to carry through to new crop. Golden Delicious is in line with last year, but smaller sizes may see gaps. Granny Smith supply is higher year over year, supporting transition to new crop. Peak sizes remain 80/88ct, with fewer smaller counts available—potentially tightening further by August as schools return. Fuji and Pink varieties are down overall but should make it to new crop.

asparagus



ALERT Supplies are gradually tightening as most domestic production has finished and the market shifts primarily to Mexico and Peru. Demand continues to exceed available volume, particularly on larger sizes, while hot weather and recent growing challenges have reduced yields and premium pack-outs. Quality remains acceptable overall, though sizing variability and occasional tip quality issues persist. Markets are expected to stay elevated through mid-July, with additional Mexican production expected later in the month.

avocados



Supplies are strong with volume from Mexico's Loca crop, California, and Peru. Quality is excellent, and inventories are comfortably meeting demand. Larger sizes remain most available, while smaller fruit is somewhat tighter. Markets remain stable and offer favorable buying opportunities through late July.

bananas



Supplies remain stable with consistent

production, reliable shipping, and strong quality. Demand is balanced, and pricing remains favorable heading into the summer months.

beans



Green Beans: **RADAR** 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: **ALERT** Demand continues to exceed supply. The North Carolina season has ended, and limited Central California production is adding pressure. Expect short supplies for the next 3–4 weeks.

Blueberries: Supplies are improving with increased volume from the Pacific Northwest. Availability is strengthening, creating promotional opportunities. Jumbo size availability is also expected to improve.

Raspberries: **ALERT** Supplies remain light and demand continues to exceed availability. Growers expect volumes to gradually increase over the next few weeks.

Strawberries: Supplies remain steady from Watsonville/Salinas. Post-holiday demand has eased, while cooler temperatures have slightly reduced yields. Additional fruit is available, and favorable weather is expected to support strong supplies. Quality continues to improve.



Market UPDATE

broccoli



Broccoli: **ALERT** Supplies remain light in Salinas and Santa Maria. Demand has increased, quality is fair, and market prices have risen. Limited availability is expected to continue for the next few weeks.

Brocolini: Supplies and quality remain steady, with good demand and improved availability. Market pricing is expected to remain stable in the coming weeks.

brussels sprouts



Supplies and quality remain steady. Availability is expected to stay stable, making this a good item to promote. Pricing should remain consistent in the coming weeks.

cabbages



Supplies, yields, and quality remain steady in Central California. Demand and pricing continue to be stable.

carrots



Production has fully recovered following the transition to the Imperial Valley. Supplies are ample, quality is excellent, and sizing has normalized. Markets remain stable with strong availability expected through the summer months.

cauliflower



ALERT Supplies are light and demand remains strong. Forecasts are below expectations, quality is fair, and pricing continues to trend higher. Limited supplies are expected for the next few weeks.

celery



Supplies are good from Salinas, with steady demand and good quality. Improved availability continues to support lower market pricing.

citrus



Limes: The market is becoming more balanced, though availability favors larger fruit. Heavy rainfall in Mexico has increased large-size supplies while tightening small sizes. Colombian imports continue to provide strong volume and good quality. Some weather-related cosmetic issues may increase later this month, but overall market conditions are significantly improved from spring shortages.

Lemons: **RADAR** Supplies remain adequate, but smaller sizes continue to be limited due to a crop skewed toward larger fruit. Imports are helping supplement availability, while strong demand is keeping markets elevated. Quality is good overall, though some cosmetic defects remain. Flexibility on sizing will be important through July.

Oranges: **RADAR** California Valencias continue to show excellent quality and eating characteristics. However, smaller sizes, particularly 113s and 138s, remain extremely limited. Demand from foodservice, schools, and retail is keeping pressure on small-fruit availability, while larger sizes offer the best coverage. Expect strong quality but continued sizing challenges through the remainder of the season.

corn



Supply and quality have improved and continue trending upward. Mexico is seeing fewer quality issues as conditions stabilize and production increases, while Georgia output is rising. Market pressure has eased as regions transition and Eastern quality improves.



Market UPDATE

cucumbers



Supplies are light as production transitions to northern growing regions. Eastern volume is coming from New Jersey and Michigan, with New York expected to begin harvest within 7–10 days, improving availability. Western supplies remain limited due to weather impacts in Baja, though quality is good and production is expected to recover. Washington continues to provide supplemental volume.

eggplant



ALERT Supplies remain moderate, led by Georgia, with additional volume coming from North Carolina and other regional programs soon. Western production from Fresno and Central Mexico is steady and improving, with good overall quality. Availability is expected to improve further next week as seasonal production expands and pricing continues to ease.

grapes



The California domestic season is in full swing, with strong volumes, excellent quality, and favorable sizing. As harvest progresses, supplies continue to improve, supporting attractive promotions and competitive summer pricing.

herbs



Supplies remain mostly stable, with California and Baja providing consistent coverage. Quality is generally good, though delicate herbs remain vulnerable to heat-related shelf-life issues. Basil, dill, and some specialty herbs may see occasional availability fluctuations. Cilantro has stabilized, demand remains steady, and markets are generally balanced.

kale



Supplies remain steady with good demand. Quality is fair, pricing is stable, and availability should remain consistent over the next few weeks.

lettuce



Green & Red Leaf: Supplies and quality continue to improve. Softer demand and better availability are helping lower market pricing. Further supply improvements are expected.

Iceberg: Supplies, yields, and quality continue to improve. Lower demand has eased pricing, and carton weights are expected to be stronger. Markets should remain stable in the coming weeks.

Romaine: Availability, quality, and yields continue to improve. Increased regional production has softened demand, supporting stable pricing and stronger carton weights.

Tender Leaf: Supplies remain good with steady grower volume. Quality has improved, and stable supplies and pricing are expected over the next several weeks.

melons



Cantaloupe: Domestic production continues to strengthen, with excellent quality, strong flavor, and increasing availability. Larger sizes remain more abundant, while smaller sizes may still command a premium. Overall market conditions remain favorable.

Honeydew: **ALERT** Prolonged heat and early-season growing stress have reduced yields, tightened supplies, and resulted in smaller sizing. Availability remains limited, and pricing is expected to stay elevated until production improves later this summer.



Market UPDATE

mushrooms



Supplies are steady, demand remains strong, and quality is good. Seasonal summer fluctuations are possible, but pricing remains stable.

onions



Supplies are now being shipped from California, New Mexico, and Georgia. All colors and sizes are available, with continued strong quality. Market prices have decreased slightly.

onions green



Supplies remain plentiful from Mexico. Availability and pricing are expected to stay favorable through the coming weeks.

pears



Anjou pears have roughly 8–9 weeks of supply remaining. New crop Bartletts are expected to start in early August, aligning closely with the end of Anjou shipments. Red Anjous and Bosc are expected to wrap up within the next month.

peppers bell



ALERT Supplies remain somewhat limited as Eastern production transitions from Georgia to newer crops in New Jersey and North Carolina. Recent heat has reduced volume and jumbo sizing, though quality has improved. Western production has shifted to Fresno, with increased volume expected as fields reach peak production. Additional Washington supplies are expected by late July or early August.

peppers chili



ALERT Supplies remain limited as production

transitions to regional summer growing areas. Availability should improve as Michigan and other northern regions begin harvesting. Western supplies from Baja and California remain light but good quality. Habaneros are the tightest item, though new harvests expected within 10 days should help improve availability.

pineapples



Supplies remain steady with good availability and quality. While some sizing variability may occur, market conditions are stable, and no major supply disruptions are expected.

potatoes



RADAR Idaho is currently shipping Burbanks, with prices slightly higher, though supplies remain ample and are expected to stay plentiful until Norkotah harvest begins early September. Planting for the 2026 crop finished earlier than normal, and acreage has been reduced to 300,000 acres (-4.8% YoY) in response to 2025 oversupply; however, favorable weather, adequate irrigation, and strong early crop conditions point to solid production potential despite the cutbacks, while fingerlings are experiencing a short-term supply gap of 3-4 weeks.

squash



Supplies remain strong with multiple growing regions active across the East and West. Michigan is beginning harvest and should add meaningful volume in the coming weeks. Quality is generally good, with Western production from Fresno, Santa Maria, Baja, Oregon, and Washington providing ample supply and consistent coverage.



Market UPDATE

tomatoes



ALERT Supplies are transitioning across growing regions. Grape tomatoes remain the most limited, with tight availability expected for the next 10–12 days before improving as Virginia and regional production ramp up. Roma supplies are

light in the East but improving, while Western volumes remain steady. Round tomatoes have the strongest supply position, supported by seasonal transitions in the East and strong California production. Overall, tomato availability is expected to improve in the coming weeks.

in the news...

Why cheap bananas may be a thing of the past

Carla Espinoza Gutiérrez | July 9, 2026 | freshfruitportal.com

Bananas have long been the North American grocery aisle's greatest paradox: a tropical fruit that travels thousands of miles by refrigerated ship, yet somehow costs less per pound than a locally grown apple.

But according to Fairtrade International, the razor-thin margins keeping bananas cheap are about to snap.

While Fairtrade's October 2025 Minimum Prices built in a safety cushion for normal market fluctuations, prolonged geopolitical tensions and stubborn post-pandemic input costs are pushing growers to the brink.

"If the Middle East conflict continues and has a significant impact on inputs, these minimum prices may be exceeded. Therefore, it is important that we monitor the situation

frequently," Fairtrade Senior Advisor Silvia Campos told FreshFruitPortal.com.

A banana split between costs and prices

Campos said some petroleum-based input costs could decline if tensions in the Middle East ease, but there's little certainty.

Take fertilizer prices, for example, which climbed to record levels in 2022 and even doubled in some cases, according to the World Bank. Although prices later eased, many remained above pre-pandemic levels, continuing to pressure agricultural producers worldwide.

"Companies, unfortunately, take advantage of the situation—input prices may drop but never return to previous levels," she explained.

Her assessment aligns with broader concerns across the North American banana industry about the widening gap between production costs and retail pricing. According to industry outlet The Produce News, many American retailers continue to use bananas as a loss leader despite decades of inflation and rising production expenses.

Tom Stenzel, managing director for the Banana Association of North America, told the publication that higher fertilizer costs, ocean freight, fuel expenses, disease pressure, and extreme weather have increased financial stress throughout the supply chain while retail prices have remained comparatively low.

"Currently, producers...

[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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