

Market Outlook

Week 47: November 16-22, 2026

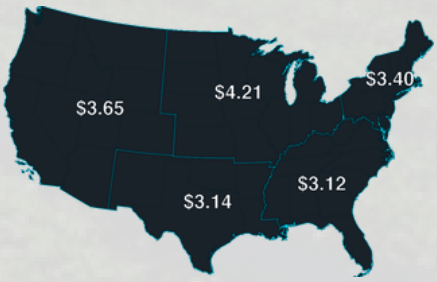
Market Alert

- Asparagus
- Avocados
- Beans
- Berries
- Cabbage
- Cauliflower
- Cucumbers
- Grapes
- Lettuce
- Mushrooms
- Peppers
- Squash
- Tomatoes

Transportation

Nat'l Diesel Avg: $6.127 ▼
Last Year: $3.837 ▲
Nat'l Fuel Surcharge: $0.89
Shortages:

- **extreme** - N/A
- **slight** - CA, FL, & WA



previous week's average outbound reefer rate for each region
Map from DAT

Weather Outlook

Oxnard, CA: Sunny skies and showers with highs in the upper 60s and lows in the 40s to 50s.
Salinas, CA: Partly cloudy skies and showers with highs in the 60s and lows in the 40s.
Yuma, AZ: Moatly sunny skies with highs in the 70s and lows in the lower 50s.
Immokalee, FL: Partly cloudy skies and showers with highs in the 80s and lows in the 60s.
Idaho Falls, ID: Partly cloudy skies and snow with highs in the 30s to 40s and lows in the lower 20s.



Market Update

apples

Washington apples are entering November with good overall quality. Earlier forecasts placed production around 176 million bushels, approximately 2% below last season, though later industry observations suggested an even smaller fresh crop. Cooler late-season weather improved color and internal quality across most varieties, although some challenges have been reported in Honeycrisp and SugarBee. Gala, Fuji, Granny Smith, Honeycrisp, Red Delicious and premium varieties should provide a broad assortment heading into the holidays.

asparagus

ALERT Supplies remain extremely tight, with weather-related challenges limiting availability from Mexico and Peru. Mexican volumes are declining, increasing reliance on Peru, where lower yields and weather-related quality concerns continue to limit supply. Larger sizes, particularly jumbo and extra-large, remain the most difficult to source, while smaller sizes are comparatively more available. Tight supplies are expected through Thanksgiving and potentially until Sonora production begins.

avocados

RADAR Supply from Mexico remained extremely limited this week as harvest restrictions continue across several key municipalities. Additional supply constraints are expected over the next few weeks, with planned Saturday harvest closures for training and Monday's observed holiday in Mexico. As a result, we do not anticipate a significant near-term increase in supply. Markets remain elevated and current inventories remain at approximately 25–30 million pounds, well below weekly demand of roughly 50 million pounds.

bananas

Supplies remain stable with steady production, reliable shipping schedules, and strong quality. Supply and demand are well balanced, keeping the overall market conditions and pricing favorable.

beans

ALERT Supplies remain tight as reduced yields, seasonal transitions, and weather challenges continue to limit availability. Mexico has provided little relief, while recent South Florida rainfall has further impacted harvesting. Prices continue to increase, and available product is being prorated.

berries

Blackberries: Supplies are improving as Mexican production ramps up, increasing volumes signficantly through Texas. Quality is generally good to fair, though some red coloring and soft fruit persist. Watsonville production remains limited as California winds down, shifting supply toward Mexico. Production should continue building through November, supporting strong availability over the next several weeks.

Blueberries: **ALERT** Supplies remain tight as the market relies on imports, primarily from Peru. Quality is generally good, though seasonal gaps and recent port delays have limited availability. Arrivals should gradually improve through the second half of November, with more consistent supplies expected by month-end.

Raspberries: **ALERT** Supplies continue to improve, with increased availability through Texas. Production remains fair as Watsonville winds down and Mexican growers prune late-season blocks, with quality generally good to fair. Mexico will become the primary growing region, with steady November production followed by stronger volumes in December.

Strawberries: **ALERT** Supplies remain extremely tight as previous rains impact production and quality across California, causing reduced yields, pin rot, decay, soft fruit, and misshapen berries. Additional rain could further disrupt harvesting. Mexico and Florida have started production, but volumes remain limited, while Baja is showing modest improvement. Availability is expected to remain very limited through next week, with meaningful improvement unlikely until late November.



Market Update

broccoli

Broccoli: Supplies remain steady with strong demand. Cooler temperatures have reduced insect pressure, while quality continues to improve. Supplies and market pricing are expected to remain steady over the next few weeks. Desert production will begin shortly, with positive initial quality reports from Yuma.

Broccolini: Supplies and market pricing continue to improve, while demand remains strong. Cooler temperatures should further reduce insect pressure and improve yields and availability. Improvement is expected to continue as production transitions to Yuma over the next few weeks.

brussels sprouts

Supplies remain steady, though quality is currently fair. Cooler temperatures have reduced insect pressure, and availability is expected to remain steady over the next few weeks. Holiday demand is increasing and is expected to push market pricing higher.

cabbages

ALERT Supplies remain light, while demand and market pricing remain elevated. Cooler temperatures have reduced insect pressure to normal levels, though quality from Central California remains fair. Growers will transition to Yuma next week, where initial reports are positive. Quality and availability should improve once the transition is complete.

carrots

Supplies are abundant, quality is excellent, and sizing has returned to normal. Strong availability is expected to continue.

cauliflower

ALERT Supplies remain light amid increased demand, with product currently coming from Salinas and Santa Maria. Availability is expected to remain limited over the next few weeks as growers transition to Yuma. Most growers are still several weeks from completing the transition, though initial desert quality reports are positive.

celery

Supplies are lighter as holiday demand increases, with production from Salinas, Santa Maria, and Oxnard. Overall quality is fair, and yields are covering weekly contracts. Supplies are expected to gradually decline as regions wind down, putting upward pressure on market pricing.

citrus

Limes: Supplies are generally adequate but moving into a seasonal shoulder period, particularly in Mexico. Mexico remains the dominant U.S. source, with Colombia providing an increasingly important secondary supply. Both origins are moving out of peak production and into lower-volume shoulder seasons. Since both produce year-round, the primary concern is not a supply gap but potential volatility from weather, sizing shifts and changing pack-outs.

Lemons: California supply is in a seasonal transition as coastal production wraps up, desert harvest accelerates and Central Valley production develops. Desert fruit has faced some quality challenges from excessive heat, humidity and wind, though sizing has generally been favorable. Central Valley production has started with positive reports for volume, size and quality. Meanwhile, imports are declining seasonally, shifting the U.S. market increasingly toward domestic California production.

Oranges: Initial Navel production is weighted toward smaller sizes, with 113s and 138s predominant early in the season. The broader crop outlook is favorable, with the 2026/27 California Navel crop forecast around 84 million cartons, approximately 2.4% above last season and 15% above the five-year average. Volume should strengthen through November and December, creating better California supply. Smaller sizes should remain plentiful early, while the size distribution broadens as additional districts mature.



Market Update

cucumbers



RADAR Supplies remain tight as growing regions transition on both coasts. Georgia is winding down while Florida begins with lighter yields following heavy rainfall, keeping Eastern availability limited. Western supply is transitioning from Baja to Sonora and Sinaloa, with gradual improvement expected over the next two weeks as Sinaloa production builds.

eggplant



Availability remains steady, with consistent Eastern production and good quality out of Georgia and Florida. Western supplies are transitioning from Fresno to Coachella and Mexico, with volumes expected to improve over the next 7–10 days as Mexican production ramps up.

grapes



ALERT Green grape supplies remain tight with limited availability and elevated pricing as California winds down and growers ship from storage. These conditions are expected to continue into early December. Where possible, shifting away from green grapes is recommended.

herbs



Supplies remain stable across basil, mint, rosemary, thyme, oregano, dill, and other specialty varieties. California and Baja continue to support availability, supplemented by imports depending on the variety. As cooler temperatures and shorter daylight slow domestic production, supply will continue shifting toward Baja and offshore regions. Overall availability remains adequate, though occasional tightening may occur during seasonal transitions.

kale



Supplies remain steady with elevated demand and good quality. Availability may fluctuate as growers transition to Yuma and Mexico over the next few weeks. Cooler temperatures have reduced insect pressure to normal levels, while pricing is expected to remain steady.

lettuce



Green & Red Leaf: **ALERT** Supplies and quality are showing improvement, though elevated demand continues to support the market. Most growers will transition leaf production to Yuma by next week. Initial desert reports are positive, with improved quality and availability helping ease market pricing.
Iceberg: **ALERT** Supplies are slowly improving, though demand remains elevated. Carton weights remain lighter, while head sizing and overall quality have improved. Some growers are finishing the Huron season, with most transitioning to Yuma next week. Initial desert reports are positive, with further improvements in quality and supply expected after the transition.
Romaine: **ALERT** Supplies are showing improvement, though demand remains elevated. Carton weights may remain lighter early in the week but should improve day over day. Markets have softened as availability improves and early desert harvesting adds supply. Growers will transition to Yuma next week, where initial quality reports are positive.
Tender Leaf: Supplies remain steady, with growers reporting fair quality. Availability may fluctuate over the next few weeks during the transition to Yuma. Cooler temperatures have reduced insect pressure, and processors will shift from Central California to Yuma next week. Quality is expected to improve following the transition.

melons



Rains across the desert region paused harvests and may affect quality for the remainder of the Yuma season, with some dirt, mud and scarring expected. Cantaloupes are mainly 9s and 12s, with few jumbos, while honeydews are mostly 5/5Js with limited 6/8s. Internal quality remains strong, with Brix at 12% or higher. Guatemalan cantaloupes begin arriving in Florida late next week and California around Thanksgiving, with favorable growing conditions supporting a positive start to the offshore season.



Market Update

mushrooms

ALERT Supplies are very limited as demand continues to increase ahead of the holidays. Quality is fair, while labor shortages are limiting harvests, particularly for white button mushrooms, and causing missed sizing windows. Supplies are expected to be tight through next month, with market pricing remaining elevated.

onions

The market pricing continue to decline. Super colossal and colossal sizes are expected to remain tighter than normal due to extreme heat, wildfire smoke, and other growing challenges that impacted sizing and reduced yields. Rising costs for seed, fertilizer, labor, and transportation continue to pressure the supply chain. While pricing has softened, market levels are expected to strengthen ahead of holiday demand, particularly on jumbo and larger-sized onions where availability remains limited.

onions green

ALERT Supplies have returned to normal as availability from Mexico improves following previous weather-related challenges. Better yields and quality have helped market pricing normalize. Supplies are expected to continue improving week over week, with pricing remaining steady.

pears

Washington availability is expected to improve steadily as harvest volumes increase. Bartlett availability will expand first, followed by Anjou, Bosc, and specialty varieties. Quality is reported as strong, with good color, sizing, and pressure. While demand typically rises with new-crop arrivals, the larger harvest should help maintain balanced market conditions and limit major price volatility.

peppers bell

RADAR Supplies remain snug across both coasts as weather and seasonal transitions limit production. Georgia remains the primary Eastern region, though recent rains and seasonal decline have reduced volumes. Florida is beginning light production, with stronger yields anticipated in 10–14 days if weather cooperates. In the West, Coachella continues with below-normal production, while Mexico is several weeks behind schedule and expected to begin light harvesting toward the end of the month.

peppers chili

ALERT Supplies remain tight across both coasts as growing-region transitions and recent weather limit availability. In the East, Georgia remains the primary supply region through Thanksgiving, while Florida is beginning light production. Western supplies remain constrained across Baja, Central Mexico, and Sonora, with poblanos, Anaheims, and tomatillos particularly limited. Availability should gradually improve over the next 2–3 weeks as Sonora expands production and Sinaloa begins its season.

pineapples

Supply is steady overall but trending toward larger fruit. Small fruit (9/10 count) is limited, while 7-count remains very tight. Other sizes and crownless fruit are balanced, with strong internal quality and Brix averaging 15.8%. Recent heavy rains caused some basal spot and reduced planting, while increased sunshine is contributing to sunburn. U.S. spot prices have increased, particularly for 7-count. Reduced planting is expected to lower volumes in the second half of 2027.

potatoes

Acreage is estimated to be down 5–8% from last year, resulting in a somewhat smaller crop. Overall quality, sizing, and yields remain favorable; however, larger-size potatoes continue to see tighter availability. Market pricing continues to increase, with larger counts seeing the most pressure. Additional firming is possible as holiday demand picks up.

squash

RADAR Supplies remain generally adequate nationwide, though Eastern availability could tighten as Georgia winds down and heavy rains impact



Market Update

squash cont...

Florida production. Western supplies remain steady out of Sonora, with stronger zucchini volumes and good quality. Sinaloa is expected to begin harvesting soon, supporting more consistent availability moving forward.

tomatoes

AOG Grape, Roma, Round, and Cherry tomato supplies remain tight nationwide as weather continues to limit production and quality across both coasts. Florida has begun harvesting, with volumes gradually improving, though recent rains have slowed yields, impacted quality, and contributed to smaller sizing in some varieties. In the West, Baja and Central Mexico remain limited due to persistent wet and overcast conditions, resulting in lighter volumes, variable quality, and reduced pack-outs. Demand continues to outpace available production, particularly for Cherry tomatoes, while Central Mexico is in a slightly better supply position but does not have enough volume to significantly ease overall constraints. Availability should gradually improve over the next few weeks as Florida production builds and additional Mexican production comes online, with more meaningful Western relief expected as Sinaloa volumes increase from late November through December.





Market Update

In The News...

The Trillion Serving Gap: What the Numbers Are Really Telling Us

Mike Mauti | October 15, 2026 **| northamerica.visionmagazine.*com***

Here is a number worth sitting with for a moment. One trillion. That is approximately how many fruit and vegetable servings would be consumed across Canada and the United States each year if every person ate seven servings a day — a level of consumption broadly in line with healthy-eating guidelines in both countries. Multiply that by the combined population of two of the wealthiest, most food-secure nations on earth.

On paper, it is perfectly achievable. In practice, we are missing it by roughly half a trillion servings. That is one million servings every minute. One full truckload of fresh produce every 10 seconds left uneaten. The gap is not a rounding error. It is a structural failure, and understanding it requires us to stop blaming the usual suspects and start asking harder questions.

Price Is Not the Whole Story

When produce consumption underperforms, the lineup of suspects is familiar. Price, the economy, tariffs, supply chain disruptions; these are real forces, and nobody is dismissing them. But here is what the data keeps revealing: price is not the primary driver holding consumers back.

Our research at Execulytics found that 35% of consumers say preparing produce takes too much time. Thirty-eight percent say they waste too much when they overbuy. Half of consumers will not buy produce unless they already have a specific recipe in mind. And 80% buy the same items week after week, not out of passion, but out of habit. Same apples, same bananas, same salad mix. The devil you know beats the vegetable you don't.

Lowering the price of kohlrabi does not teach anyone how to cook kohlrabi. A discounted unknown is still unknown. Produce is not just price elastic; it is friction elastic. The real barrier is not always the shelf price. It is the anxiety that shows up at 6:45 on a Tuesday evening, when someone opens the fridge, stares at the wilting spinach and the optimistically purchased shiitake mushrooms and quietly closes the door.

That moment is where half a trillion servings go to die.

The Behavioral Signature

Taken together, these findings form something more revealing than individual data points: a behavioral signature. A consistent, predictable pattern of hesitation and self-doubt playing out across millions of kitchens every week.

Fear of waste is a cornerstone of that pattern. About 40% of shoppers admit they leave products on the shelf because they worry they will not consume them before they spoil. Our apple research found that 13% of purchased apples are eventually thrown away. Not strawberries, not fresh herbs — apples, the long-lasting, low-maintenance, supposed easy win of the produce department. One in eight, gone, just like that.

The spiral is predictable once you see it: Shoppers overbuy with good intentions. But then something stands in the way of those intentions, and produce goes to waste. The whole experience leaves a mark. Future purchases are approached with more caution or skipped entirely. Variety stalls, volume plateaus and the closed loop tightens.

The kitchen compounds the problem. Fresh produce carries a surprisingly high cognitive load. Every item asks something of the shopper: How should I store this? When will I use it? What do I make with it? What happens if I don't get to it? When energy is low and planning is thin...

Read full article HERE



Market Update

Salinas - Leaf Transition Schedules - Fall 2026

Grower / Shipper	Current Location	Transitioning	Commodity	Transition Dates	Smaller Transitions before moving to Yuma Az.
Bengard Ranches	Salinas, CA	Yuma, Az	Broccoli Crowns	Nov 13-16, 2026	
Bengard Ranches	Salinas, CA	Yuma, Az	Cauliflower	Nov 13-16, 2026	
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Iceberg	Nov 13-16, 2026	Huron, Ca. - 10/16/26
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	Nov 13-16, 2026	Oxnard, Ca. - 10/12/26
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Romaine	Nov 13-16, 2026	Oxnard, Ca. - 10/07/26
Bengard Ranches	Salinas, CA	**Oxnard, Ca**	Celery	Dec 1-4, 2026	Oxnard, Ca. - 12/01 - 06/15/27
Church Brothers	Salinas, CA	Yuma, Az	Broccoli Crowns	Nov 23, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Cauliflower	Nov 23, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Iceberg	Nov 19, 2026	Huron, Ca. - 10/16/2026
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	Nov 16, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Romaine	Nov 2, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Celery	Nov 16, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Value Added / Processing Plant	Nov 16, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Broccoli Crowns	Nov 9, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Iceberg	Nov 9, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	Nov 9, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Romaine	Nov 9, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Value Added / Processing Plant	Nov 9, 2026	
Green Gate Fresh	Salinas, CA	Yuma, Az	Value Added / Processing Plant	Nov 9, 2026	
River Fresh Farms	Salinas, CA	Yuma, Az	Broccoli Crowns	Nov 23, 2026	
River Fresh Farms	Salinas, CA	Yuma, Az	Cauliflower	Dec 2, 2026	
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Iceberg	Nov 9, 2026	Huron, Ca. - 10/16 - 11/13/26
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	Nov 16, 2026	Oxnard, Ca. - 10/07 - 11/13/26
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Romaine	Nov 9, 2026	Oxnard, Ca. - 10/07 - 11/13/26
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Romaine Hearts	Nov 9, 2026	Huron, Ca. - 10/22 - 11/13/26
River Fresh Farms	Salinas, CA	**Oxnard, Ca**	Celery	Nov 30, 2026	Oxnard, Ca. - 11/30 - 06/04/27
River Fresh Farms	Salinas, CA	Yuma, Az	Tender Leaf/Value Added	Nov 16, 2026	
Taylor Farms - CA	Salinas, CA	Yuma, Az	Value Added / Processing Plant	Nov 16, 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 the current market conditions. Also look for our Spanish version that will be released on Monday. Have a great week!

Your Dedicated NPC Powered by Foodbuy Staff