

Market Outlook

Week 48: November 23-29, 2026

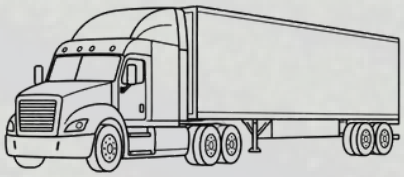
Market Alert

- Asparagus
- Beans
- Berries
- Brussels Sprouts
- Cabbage
- Cauliflower
- Celery
- Cucumbers
- Grapes
- Limes
- Mushrooms
- Peppers
- Tomatoes

Transportation

Nat'l Diesel Avg: $5.937 ▼
Last Year: $3.868 ▲
Nat'l Fuel Surcharge: $0.92
Shortages:

- **extreme** - AZ
- **slight** - AZ, CA, GA, & WA



Weather Outlook

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



Market Update

apples



Cold-storage inventories are increasingly supporting consistent year-round distribution, allowing packers to manage shipments based on demand and variety needs. Gala, Fuji, Granny Smith, Honeycrisp, Red Delicious, Golden Delicious, and other varieties should remain widely available, though size and grade profiles may vary. Thanksgiving demand should support steady retail and foodservice movement, particularly for baking, prepared foods, and fresh consumption. Overall quality should remain favorable through controlled storage and established packing operations.

asparagus



ALERT Supplies remain extremely tight ahead of Thanksgiving, with lower yields and weather impacts constraining Mexican and Peruvian production. Mexican volumes continue to decline, while Peru remains unable to offset the shortfall. Limited availability is expected into December, with some relief from Central Mexico leading into early January.

avocados



Harvesting has resumed, with inventories rebuilding throughout the supply chain. Both Flora Loca and Adventajada production are contributing to shipments, with dry matter and oil content generally in the mid-to-high 20% range, supporting similar ripening characteristics. Quality and maturity remain favorable, though maintaining consistent supply and ripening schedules remains a challenge as inventories recover. Demand is expected to remain active through Thanksgiving, creating pressure on ready-to-eat fruit and ripening programs.

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 increases, while Watsonville continues to contribute light volumes. Overall quality is improving with better growing conditions in Mexico, though some red cell and soft fruit are still reported. Supplies are expected to remain steady through early December as Mexican production builds.

Blueberries: **ALERT** Supplies are very tight as Peruvian volumes decline and the domestic season ends, leaving imports as the primary source. Peruvian quality is good, but volumes are expected to decline into December and January. Chile is contributing fruit but faces weather challenges that could limit its ability to offset lower Peruvian production. Availability is expected to remain limited until additional volume arrives after December.

Raspberries: Supplies are improving as Mexican volumes rebound following production declines. Mexico is now the primary growing region with Watsonville ending. Some growers are pruning late-season blocks, which may keep production relatively steady through November. Quality remains good, with supplies expected to gradually increase in December.

Strawberries: **ALERT** Supplies remain extremely tight as California production declines, with additional rainfall expected to disrupt harvests, yields, and quality. Some areas could receive up to 2 inches of rain, increasing concerns with pin rot, misshapen fruit, and weather-related damage. Crews continue to sort heavily for quality packs. Central Mexico and Florida are beginning to add volume, but both remain early in their seasons, with Florida rain potentially slowing its ramp-up. The next few weeks are expected to be among the lightest harvest periods of the year.



Market Update

broccoli



Broccoli: Supplies remain steady this week with strong demand. Cooler temperatures have reduced insect pressure and improved quality. Supplies and market pricing are expected to remain steady over the next few weeks as production transitions to Yuma, where initial quality and yield reports are positive.

Broccolini: Supplies and market pricing continue to improve, while demand remains strong. Cooler temperatures have reduced insect pressure and improved yields and availability. Further improvement is expected as production transitions to Yuma over the next few weeks.

brussels sprouts



ALERT Supplies are light this week, with quality reported as fair. Cooler temperatures have reduced insect pressure to normal levels. Holiday demand remains strong, and supplies are expected to stay light over the next few weeks as growers transition regions, putting upward pressure on pricing.

cabbages



ALERT Supplies remain light this week, while cooler temperatures have reduced insect pressure and improved quality. Strong demand continues to keep pricing elevated. Growers and processors have transitioned to Yuma, where initial reports are positive. Quality and availability are expected to improve over the next few weeks.

carrots



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

cauliflower



ALERT Supplies remain limited this week as demand has increased. Product is shipping from Salinas and Santa Maria, with light supplies expected until production transitions to Yuma. Most growers are about a week away from fully transitioning, with initial desert quality and yield reports positive.

celery



ALERT Supplies are light this week as holiday demand increases, with product shipping from Salinas, Santa Maria, and Oxnard. Overall quality is fair. Supplies are covering contracts and normal demand, but pricing is trending higher. Availability is expected to gradually decrease as growing regions transition to Yuma, keeping prices elevated.

citrus



Limes: RADAR Mexican availability remains relatively constrained as seasonal production and variable sizing continue to influence U.S. shipments. Changes in rainfall, temperatures, and orchard maturity may affect fruit development, coloration, juice content, and packouts. Quality concerns include yellowing, skin blemishes, dehydration, and uneven maturity. Colombian Persian limes provide an additional potential supply source, depending on export availability and shipping schedules. Thanksgiving demand should remain active, particularly through foodservice and beverage channels, while shortened schedules may affect replenishment timing.

Lemons: California supplies are transitioning further into winter production, with District 1 in the San Joaquin Valley becoming increasingly important as coastal and desert regions adjust their seasonal contributions. Supply across sizes and grades may remain uneven as harvesting progresses. Cooler temperatures support fruit coloration, while rainfall and field moisture can affect harvesting efficiency, rind condition, and packouts. Thanksgiving demand should remain relatively steady, with some additional holiday movement possible. As domestic production strengthens, reliance on imports should gradually decline, though individual sizes and grades may experience varying availability.

Oranges: California's 2026–2027 navel season is progressing with a favorable production outlook as harvesting and packing expand. The current forecast



Market Update

citrus cont...



estimates approximately 84 million 40-pound cartons, up roughly 2.4% from last season. Fruit counts are slightly higher, with marginally smaller average sizing. Harvesting began one to two weeks earlier than normal, establishing shipments ahead of Thanksgiving, while additional packinghouse activity should continue improving availability. Quality and maturity are expected to improve as the season progresses, with cooler temperatures supporting color development. Holiday retail demand should support movement, while foodservice benefits from increasing domestic availability.

cucumbers



RADAR Supplies remain snug in the East as Florida's fall crop continues on lighter acreage, with production expected for another three to four weeks before transitioning to Mexico and Honduras. Western supplies are more stable out of Sonora, with Sinaloa beginning to ramp up. Availability should improve as Mexican production increases, though Honduran volumes may be lighter than recent years.

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 generally stable across basil, mint, rosemary, thyme, oregano, dill, and other specialty varieties. California and Baja continue to support availability, with production gradually shifting toward Baja and offshore regions as cooler temperatures limit domestic growth. Overall supply remains adequate, with occasional variety-specific tightening possible during the transition.

kale



Supplies are light this week while demand remains elevated. Quality is fair, and availability may fluctuate for the next few weeks. Growers have transitioned to Yuma and some Mexican regions. Pricing has increased, while cooler temperatures have reduced insect pressure to normal levels.

lettuce



Green & Red Leaf: Supplies and quality have improved this week, while elevated demand is keeping pricing steady. Growers have transitioned from Salinas to Yuma, where initial reports are positive. Better availability and fewer quality concerns have improved market conditions week over week.

Iceberg: Supplies have improved this week while demand remains strong. Carton weights are still lighter but improving, and head sizing is nearly back to normal. Quality has also improved as most growers complete the transition to Yuma. Pricing is expected to stabilize over the next few weeks as yields improve.

Romaine: Supplies are showing signs of improvement while demand remains elevated. Carton weights may remain lighter early in the week but should gradually improve. Markets have softened with better availability and early desert harvesting. Growers have fully transitioned to Yuma, where initial reports are positive, with quality and supplies expected to improve.

Tender Leaf: Supplies remain steady, with growers reporting fair quality. Conditions should improve over the next few weeks following the full transition to Yuma. Cooler temperatures have reduced insect pressure, and processors are now shipping from the region. Supplies and quality are expected to improve week over week.



Market Update

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. Favorable growing conditions are expected, supporting a positive start to the offshore season.

mushrooms



ALERT Supplies remain very short as demand continues to increase ahead of the holidays. Quality is currently fair, while growers continue to face harvest labor challenges and reduced yields. White button availability is particularly limited due to labor shortages and missed sizing windows. Supplies are expected to remain tight for the next few months, with pricing remaining elevated.

onions



Market pricing continues 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



Supplies have returned to normal levels, with Mexico remaining the primary growing region. Availability is improving following previous weather-related yield and quality challenges, helping market pricing return to normal. Supplies and pricing are expected to continue improving week over week.

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



ALERT Supplies are transitioning from Canada to Mexico as Canadian volumes decline. Central Mexico remains somewhat light due to cloudy weather, with some green cast expected, though quality and sizing are good. Production should improve as Central Mexico rebounds and West Mexico crops come online.

peppers chili



ALERT Supplies remain tight as Eastern production transitions from Georgia to Florida, where volumes are still light, particularly on cubanelles and serranos. Western supplies are also limited as Baja winds down and new Sonora and Sinaloa crops run slightly behind schedule. Tomatillos, jalapeños, and poblanos remain especially challenging due to weather-related quality and production issues. Availability should improve as new production ramps up in December.

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. No logistics delays are reported, but U.S. spot prices have increased, particularly for 7-count. Reduced planting is expected to lower volumes in the second half of 2027.



Market Update

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

Supplies remain somewhat limited as Florida and Sonora work through lighter production. Recent rains have reduced Eastern volumes, while Western supplies should improve with favorable weather. Quality is generally average, with some scarring and scuffing on yellow squash. Availability should gradually improve as additional production comes online.

tomatoes

ALERT Grape, Roma, Round, and Cherry tomato supplies remain somewhat tight but are gradually improving as Florida production increases. Early Florida volumes remain light, with recent rains contributing to some quality issues, though overall quality is improving as harvests progress. Mexican supplies from Baja and Central Mexico also remain limited, with variable quality and generally smaller sizing on rounds. Availability across all tomato varieties should continue to improve over the coming weeks as Florida gains momentum, with more meaningful relief expected as new-crop Sinaloa production begins from mid-to-late December into early January.





Market Update

In The News...

Your favorite Thanksgiving dishes won't cost substantially more this year – here's why

Elizabeth Canales | November 18, 2026 **| theconversation.*com***

Inflation-weary Americans have at least some good news to cheer this holiday season: The cost of a basic Thanksgiving meal has stabilized.

A Thanksgiving dinner for 10 people clocks in at US$78.93, approximately 0.4% less than in 2025, according to the Wells Fargo Agri-Food Institute. That's because most staples haven't seen a sharp jump in prices.

Americans are still justified in feeling stressed about high grocery bills, but it's because of the cumulative effect of rising prices in recent years. While inflation has slowed since its peak of more than 9% in 2022, the cost of a Thanksgiving meal is roughly 25% higher than it was before the COVID-19 pandemic began.

I'm an agricultural economist who has been studying the many drivers of food inflation. What's key to remember is that inflation data tells us how quickly prices are increasing, not whether prices are returning to previous levels. So even modest price jumps today are layered on already-elevated prices.

Here's what Americans can expect when they go shopping for Thanksgiving, from turkey to dessert:

Go for frozen turkey
Stable frozen turkey prices have played an important role in keeping overall holiday meal costs close to last year's levels.

The average advertised price for a frozen turkey over 16 pounds (about 7 kilograms) was $0.96 per pound, essentially unchanged from the $0.97 per pound in the same period last year, according to the USDA Agricultural Marketing Service's Weekly Turkey Report, published on Nov. 13, 2026. These prices reflect the typical discounts leading up to Thanksgiving, when retailers often cut turkey prices as part of their holiday promotions.

It's a different story with fresh turkey prices, which are about 11% higher than a year ago, according to the Department of Agriculture data. So shoppers seeking a fresh bird may face a higher grocery bill.

A longer-term trend is that turkey consumption has gradually declined over time. As a result, the cost of Thanksgiving depends on much more than turkey prices alone. This is where side dishes come in.

A mixed picture for side dishes
Mashed potatoes, cranberry sauce and sweet potato casserole are among the dishes that a frugal shopper might consider.

Sweet potatoes are 12.5% cheaper year on year, and cranberry prices have dropped 4.8%, according to the USDA Agricultural Marketing Service's Weekly Grocery Store Specialty Crops data.

Potato prices, meanwhile, have been stable, increasing just 1.1% over the past year, according to September's consumer price index, the most recent month of full data. If you're considering mac and cheese, the costs of the main ingredients should balance out: Pasta and cornmeal prices are 4.3% higher year on year, while cheese is 3% cheaper.

Prices for fruits and vegetables, however, have mostly ticked upward and are 3.9% higher than a year ago. That includes green beans, which are 2.2% more expensive. Prices for fresh apples are up 7.5%, and up 2.6% for lettuce.

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 ***