

Commodity Forecast



Jan - Mar 2026

Apples	<p>The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Association apple crop projections just released show an additional decrease of 5 million boxes from the early season projections. That's a total reduction of approximately 8 million boxes since September. Spring and Summer growing conditions produced a larger than normal size profile, which has made the 100–175 count sizes that foodservice relies on much tighter than originally projected. At the same time, favorable growing conditions led to higher color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-average range, the Red Delicious, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties such as Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and Organics.</p>	Blackberries	<p>Blackberry production out of Central Mexico remains steady, with balanced market conditions and consistent supply. Mexican production is expected to stay strong throughout Q1, and a diverse portfolio of varieties will support reliable, consistent volumes across the quarter.</p>
		Blueberries	<p>Blueberry volumes out of Central Mexico (CMEX) are declining as we enter Q1. Import supplies at the start of the quarter will transition from being primarily Peruvian to predominantly Chilean, with strong availability from Chile through the first half of Q1, supported by supplemental volume from Peru and Mexico. As the quarter progresses, supplies are expected to tighten. Domestic production out of Florida is anticipated to begin toward the end of Q1, while overall import volumes shift increasingly to Mexican fruit in late Q1. This transition typically results in firmer markets, with March historically being a higher-priced, lower-supply period.</p>
		Broccoli and Broccoli Crowns	<p>The cooler weather that we have had in Yuma throughout Q4 has caused a slow start for broccoli. The cold weather just doesn't allow the broccoli to grow. We also continue to see pin rot as an issue from the heavy rains Yuma experienced early on in transition. The supplies will be slightly limited as we head into Q1 but should get back to normal as we get into February. Hopefully, the weather will warm up so the broccoli supplies can improve for Q1.</p>
		Brussels Sprouts	<p>Brussels sprouts struggled a lot in Q4. Quality and supplies were greatly affected by all the adverse weather conditions that the industry sustained. Q1 will show improvements. MX supplies will ramp up in January, and quality and supplies should look good as we settle into Q1, weather permitting.</p>
Asparagus	<p>Asparagus markets are expected to remain highly volatile as we move into Q1. The Peruvian season is concluding in early January due to normal seasonality and will not return until April, which is expected to create very tight supplies throughout January. If weather conditions are favorable, production out of Mexico should improve in February. However, any weather disruptions could extend tight supply conditions and elevated markets through March.</p>	Cabbage – Red and Green	<p>As we had into Q1, quality and supplies look good for cabbage. No foreseeable issues.</p>
		Carrots	<p>Carrot supplies and quality will be good for Q1. As we get into mid part of Q1, the growing regions will be Bakersfield, Imperial Valley, Yuma and Coachella. Fields look good and supplies should be plentiful.</p>
Avocados	<p>Supplies are expected to remain strong into Q1. The Loca and Aventajada crops from Mexico are producing most US supplies. Sizing is well-rounded, but peaking on 48s and 60s. Smaller fruit, 70s and 84s, will likely remain somewhat limited for Q1. Barring any unforeseen issues, pricing and quality will be stable.</p>	Cauliflower	<p>Cauliflower has been having the same growing issues as broccoli. The cooler weather is just not allowing it to grow, and we are also seeing the same pin rot issues. Supplies and quality have improved, and we should continue to see improvements as we settle into Q1.</p>
Bananas	<p>Volume is expected to be lighter going into the first of the year with program business being encouraged to avoid spot market challenges.</p>	Celery	<p>Celery looks good for Q1. Supplies are limited right now due to the holidays but should get better as we get through January and into February. There should be no supply gaps and quality looks good.</p>

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Color Bell Peppers	Limited supply expected through late December, then should improve once the transition to the winter production regions is complete. Barring any weather events, we should expect stable supply through May 2026.	Lemons	There is expected to be plenty of fruit for Q1. Smaller sizes may begin to tighten up since the rain has put some growth on the fruit. D3 is peaking on 140/165 and will ship through February. D1 is peaking on 140/115 and will ramp up in January shipping through June. Fruit is expected to grow significantly as we get into 2026. D2 is set to start in March to supplement the large sizes out of D1 with 140 and smaller Choice.
Cucumbers	Stable supply expected through Q1 2026.		
Eggplant	Stable supply expected through Q1 2026.		
French Beans	Barring any weather issues, supplies are expected to be steady in Q1.		
Grapes	January is expected to be short and very active due to late vessel arrivals from Chile and Peru. Once we get past that, we expect good supply and firmer markets through April. Transition back to Mexico is expected to be volatile.	Lettuce – Spring Mix, Arugula, Baby Spinach	As with the lettuce and other leafy items, the warmer weather will help with quality and supply. Arugula looks like it will have good quality and supply as soon as we get into January. Size, color and length all seem to look good. Spring mix has been a roller coaster, and we saw it hit the extreme trigger in Q4, which rarely happens, but conditions are expected to improve by March. Spinach is in the same boat. We saw some issues in Q4, but warmer weather will help. As soon as we get into January, leafy greens should all improve. No foreseeable issues as long as the weather cooperates.
Green Beans	Supplies should be steady out of Florida and Mexico through Q1 barring any unforeseen weather events that could impact supply.		
Green Bell Pepper	Stable supply expected through April out of Florida and Mexico.	Limes	Forecast calls for new crop fruit starting in mid-January and the current growing areas will be ending; this could bring some size distribution challenges into late February. We do expect to see the seasonal jump in pricing until supply and sizing stabilize.
Green Leaf, Red Leaf, and Butter	Quality and supplies should continue to improve as we head into Q1. No quality or supply issues are foreseeable, but again, as with lettuce and romaine, we have concerns on the soil borne diseases from the rain. The cool mornings in January and February could affect quality and supplies.	Melons – Cantaloupes & Honeydews	Markets are expected to be lighter through the end of the year then bounce back quickly once production moves into new Guatemalan growing regions in January. Current sizing is heavy on the smaller fruit, and we should see a better sizing profile in Q1. Suppliers are not foreseeing any additional quality or supply issues, barring any weather events.
Green Onions	Green onions struggled in the end of Q4. Supplies have been extremely limited, but it looks like quality and supply will be okay in Q1. MX supplies should improve greatly in January. As for Yuma, green onions do not like cooler weather and don't grow well, so we may see small green onions throughout January and February. Conditions are expected to improve across all growing regions by March.	Melons – Watermelon	Markets expected to remain historically high during the offshore season and should retreat once Florida and Mexico ramp up volume.
Herbs	Supply should remain steady after the holiday pull, weather permitting. Available on both coasts and out of Mexico. Other import areas like Colombia and Peru will help keep suppliers full to handle demand.	Mixed Items	Supplies and quality are looking good for Q1. No foreseeable issues on the horizon.
Iceberg Lettuce	Iceberg is looking good to finish up Q4. Supply and quality are starting to improve but we are getting into the crops that were planted when there was heavy rain, so disease pressure is a concern. Sizes continue to improve and should be getting back to normal once we get into the latter part of Q1. Lettuce is fully transitioned to Yuma, so as long as we don't have cold or wet weather, the lettuce quality should improve. January and February tend to see cool mornings in Yuma so there may be some blistering and peeling from the lettuce that will be caused by the morning frost. We will monitor and update the weekly Market Reports accordingly.	Mushrooms	Supply will remain extremely tight through the holidays and then see some relief mid-January. We expect to see lighter than normal day-to-day supplies due to farming closures and rising costs of mushroom farming forcing growers to make cutbacks.
		Onions	The onion market is expected to remain stable throughout Q1. Most shipments will come exclusively from storage in the Pacific Northwest. We will see Mexican onions start crossing in February and Rio Grande Valley (South Texas) onions in late March. No significant price movement is anticipated, and the regional outlook remains unchanged. Supply, quality, and pricing should continue to favor buyers, with ample availability projected for the quarter barring any unforeseen disruptions.

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Oranges	This year's Navel crop is peaking on large sizes, so small sizes (88s and smaller) will be tight for the balance of the season. Caras are expecting overall good availability through March. Sizing this season will also be slightly larger, similar to sizing on Navels. There will be good availability on Bloods through March. Fruit will be peaking on 88/113.	Strawberries (cont.)	We expect Florida to provide excellent and consistent supplies throughout the quarter. CMEX is showing a similar upward trend, with volumes building and peak production anticipated in January, followed by steady availability through February. CMEX is expected to be the most productive region during Q1. California has also begun to rebound, with supplies steadily improving as the quarter progresses. By late Q1, California is expected to transition into the largest-volume production region.
Other Citrus Items	For most shippers, Desert Rio grapefruit will be available through February, peaking mid sizes 36/40/48. Then transitioning to Star Ruby Grapefruit thereafter. On Mandarins, the crop will begin sizing up with a larger peak of 21/24/18 expected in Jan/Feb. Strong availability on the larger fruit.	Tomatoes – East Coast	No major supply issues forecasted through May. Crop looks good and strong, and we should see very good quality through the winter season barring any unforeseen weather events that could impact production.
Pears	Pear supplies have increased significantly compared to last year, with growers reporting strong availability across all varieties.	Tomatoes – West Coast	We expect stable volume by the first week of January and anticipate promotable volume by January 15th. Supply and quality are expected to be good through early May, barring any weather events that could harm the crop.
Potatoes	Q1 will mirror the past few quarters with plenty of supply. Suppliers are not forecasting any major issues heading into the start of the year. Sizing should be good, and there should be good availability across the board. Burbanks will be available, but the bulk of what will be shipped will remain in Norkotahs. The long-term season outlook remains similar to last year, where we saw a rather depressed market.	Yellow Squash & Zucchini	No major supply interruptions expected out of Florida and Mexico through Q1, barring any weather events.
Raspberries	Raspberry production is declining, resulting in tighter supplies and a sharp increase in market levels. Despite this, Mexican production is expected to remain somewhat steady throughout Q1, with both Central Mexico and Baja contributing steady volumes and providing good overall availability for the quarter.		
Romaine and Romaine Hearts	Romaine and romaine hearts are fully transitioned to Yuma as we head into Q1. We are looking at concerns with disease pressure from the heavy rains. There may be some frost issues from the cool mornings causing some blistering and peeling. We may also still see some lighter carton weights. Overall, quality and supply should improve along with the weather as we head into January and February.		
Snow and Snap Peas	Barring any weather issues, supplies are expected to be steady in Q1.		
Strawberries	Overall supplies are expected to remain strong across all growing regions, supported by multiple districts in production including California, Baja, Central Mexico (CMEX), and Florida. While weather always remains a potential risk, the diversity of regions should help keep supplies steady throughout Q1 if moderate conditions persist. Florida production has increased recently due to warm, dry weather in Central Florida, accelerating the crop ahead of last year's schedule.		