

Market **OUTLOOK**

Week 5: Jan 26– Feb 1, 2026



Market **ALERT**

Apples
Berries
Broccoli
Brussels Sprouts
Carrots
Cauliflower
Celery
Cilantro
Citrus
Green Onions
Lettuce
Onions
Chili Peppers
Pineapples
Squash

transportation

Nat'l Diesel Avg: \$3.530↑

Last Year: \$3.715↑

Nat'l Fuel Surcharge: \$0.40

Shortages: Rates are easing to flat

- extreme - none
- slight - AZ, CA, FL & TX

National Posted Rate per mile

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



weather **OUTLOOK**

Oxnard, CA: Cloudy and sunny skies throughout the week with highs in the upper 60s and lows in the 50s.

Salinas, CA: Partly cloudy with highs in the mid 60s and lows in the 40s with sun on Monday.

Yuma, AZ: Partly cloudy and sunny skies with highs in the 70s and lows in the 40s and 50s.

Immokalee, FL: Mostly sunny skies with some morning showers with highs in the 60s and 70s and lows in the 40s.

Idaho Falls, ID: Partly cloudy skies with highs in the 30s and 40s and lows in the teens and 20s.



Market UPDATE



apples



Prolonged heat in September required heavy irrigation to protect tree health and maintain fruit quality, but this also drove 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 with very limited availability of 125/138 counts. Markets are expected to become firmer, 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 projected to remain at premium market costs, and customers are encouraged to plan for alternative fruits where small-size requirements cannot be met.

asparagus



Supplies remain moderate, though volume is steadily improving as Mexican production stabilizes. Demand is consistent across the country. Quality is strong, with well-sized spears and minimal seeding. Supplies are expected to strengthen over the next 2-3 weeks as harvest cycles become more stable.

avocados



Supply is healthy with steady harvests and strong cross-border movement. Demand remains solid ahead of early-February promotions. Quality is good, with consistent dry matter and sizing leaning toward 48s and 60s. Pricing is generally stable, showing slight softening as volume increases. Markets are expected to remain well supplied and steady into early February.

bananas



Supplies remain steady with reliable shipping and

balanced markets, and both demand and pricing are holding stable with no disruptions anticipated. Overall quality is good, though some cosmetic issues—such as scarring and blemishes—may appear in the coming weeks as longer transit times and variable weather influence the fruit.

beans



Green Beans: Volume is slightly reduced as cooler overnight temperatures slow harvest pace. Demand remains firm—especially in the Southeast and Texas—adding mild upward pressure to FOB markets. Quality is mixed, with some scarring and color variation linked to recent weather stress. Supplies are expected to stay tight into early February before warmer conditions support stronger yields and improved quality.

berries



Blackberries: Production continues in Central Mexico with good availability and overall good quality. Some softness and red-cell color reversion are occurring due to recent heat, rain, and humidity in the growing regions.

Blueberries: **ALERT** Production continues in Central Mexico, but supplies are tight as crops move past seasonal peak volumes. Quality and sizing remain very good, though demand is exceeding supply. Central Mexico fruit is performing noticeably better than offshore fruit currently in the market.

Raspberries: **ALERT** Production continues in Mexico, but supplies have tightened as crops decline from seasonal peak levels. Overall quality is good, though some soft or overripe fruit is occurring due to recent heat, rain, and humidity in the growing regions.

Strawberries: Oxnard and Santa Maria summer-planted fall crops are winding down as fall-planted spring crops begin producing, keeping



Market UPDATE

berries cont...



winter supply steady with good quality. Warm, dry weather should boost volume. Baja Mexico is ramping up, with weekly increases expected. Central Mexico is steady but is trending down after recent peaks. Florida production is lower due to cool weather and frost protection, with volumes expected to stay reduced.

broccoli



Broccoli: Supplies remain very light as field-level quality issues—such as brown head and pin rot tied to earlier fall rains in Yuma—continue to limit yields. Demand has increased, and supplies are expected to remain extremely limited next week. Quality is only fair, with decreased yields. No rain is expected in the forecast, which should help improve quality and supplies moving forward.

Broccolini: Supplies are limited, and demand has strengthened. Pricing remains elevated as lower yields continue to pressure the market. Expect firm, escalated conditions to persist over the next few weeks.

brussels sprouts



EXTREME Supplies remain extremely limited, and quality is only fair. Availability should improve gradually over the next few weeks, though Mexico's production is running behind schedule. Ongoing quality challenges continue to pressure supply, and recovery is expected to be slow. Volumes will likely stay below normal for another two weeks until the transition to the Mexico growing region is fully underway.

cabbages



Supplies continue to improve with better yields

and quality. Demand has decreased, and market pricing has improved. Quality is good, and supplies should continue strengthening over the next few weeks.

carrots



The U.S. market remains tight as heavy rain and cold temperatures in California—especially around Bakersfield—continue to disrupt harvests and reduce yields. Recent storms have caused additional delays, higher crop loss, and ongoing prorations. California is currently out of larger-size carrots (Tables, Clips, and Jumbos), with an anticipated 3–4 week gap before availability returns. Supply pressure will likely continue through the end of the Bakersfield season as the industry production shifts to the Imperial Valley in mid-February, where early conditions look favorable but not without risk. Limited volume from the Southeast offers some support but cannot fully offset California's shortfall.

cauliflower



Supplies remain very light, and demand has increased. Limited availability is expected to persist over the next few weeks. Quality is only fair, with some yellowing and mildew present. Markets are highly active, and elevated pricing is likely to continue for several weeks.

celery



EXTREME Supplies remain very light, and demand has increased in recent weeks. Additional regions will begin harvesting soon, but elevated market pricing is expected to persist for the next few weeks. Pricing should begin to ease once volume increases out of Yuma.



Market UPDATE

citrus



Limes: Markets remain firm as cooler weather in key Mexican growing regions continues to tighten supply and slow size development. Demand is strong, especially for larger fruit, which remains limited. Colombian imports provide modest support but do not materially ease tightness on bigger sizes. Quality is fair to good, with occasional scarring, and lighter color is common. Expect constrained availability on larger sizes for the next 2–3 weeks.

Lemons: Availability is solid with good overall quality, though some early-season lots display lighter color. Demand remains stable across both foodservice and retail. Sizing is trending slightly smaller, but pack-outs are strong with clean exterior condition. Expect good continuity from California through February, though sizing may remain on the smaller side until mid-season groves reach full production.

Oranges: **ALERT** California Navel are experiencing a severe, industry-wide shortage of small fruit as early-season fog, intermittent rains, and uneven sunlight pushed size profiles heavily toward larger counts. Small sizes—88s, 113s, and 138s—remain extremely limited, with no improvement expected through the remainder of the Navel season or the transition to Valencia. Fruit drop, puffing, creasing, and heavier sorting further reduce usable pack-outs, even in well-set groves. Larger sizes (56s and 72s) are readily available with strong quality and sugars, but consistent small-size coverage will not be achievable; substitutions such as Cara Caras or mandarins are recommended where smaller Navels are required.

cucumbers



Honduras has limited early volume, Florida remains light until March, and Mexico is the main

source with adequate supply. Cool weather recently slowed production, but warmer conditions should lift volumes, with quality remaining very good.

grapes



Global pricing is stabilizing as varietal differentiation becomes clearer, though premium greens remain under pressure, and West Coast shortages are driving localized tightness. Peru continues as the main supply source, with Chilean volumes ramping up to support availability, though varietal imbalances persist. Pricing is steady for reds and blacks, while greens face upward pressure, and West Coast markets are seeing premiums due to constrained supply.

herbs



Tender herbs remain affected by fluctuating temperatures, keeping supply somewhat constrained and markets active. Basil is steady but sensitive to cold-chain conditions, with occasional discoloration from cooler nights. Overall quality is fair to good with manageable defects. Weather sensitivity is expected to continue over the next 2–3 weeks, creating modest volatility in availability and pricing until conditions stabilize.

Cilantro: **ALERT** Supplies remain light, quality is only fair, and demand remains strong. Product is now shipping from Oxnard and Mexico. Market pricing has increased due to growing region transitions and strong demand. Light supplies and escalated markets are expected for the next few weeks.

kale



Supplies have improved, and demand remains good. Quality is fair, and supplies should remain

Market UPDATE



kale cont...



steady for the next few weeks. The product is now shipping from both Oxnard and Yuma. Market pricing is steady.

lettuce



Green & Red Leaf: Supplies are steady, demand is good, and quality is fair, with fair sizing and weights. Market pricing is steady but trending higher. No rain is expected in the forecast, which should support improvements in supply and quality.

Iceberg: **ALERT** Quality is only fair, with outer-leaf issues and reduced weights. Markets remain active, and supply challenges are expected over the next 3–4 weeks. Accelerated crop maturity—running 1–2 weeks ahead of projections—is pushing harvests forward, creating the risk of future supply gaps as fields intended for later windows are pulled ahead of schedule.

Romaine: Supplies are steady, but demand has increased. Quality is fair, with outer-leaf issues and lighter weights expected. Markets remain active. Accelerated crop maturity is pushing growers to harvest earlier than planned, creating the potential for future supply gaps as later-scheduled fields are pulled forward.

Tender Leaf: **ALERT** Supplies remain light as ongoing quality concerns continue to limit yields. Recent weather inconsistencies have created variable quality, with arugula, spinach, and spring mix showing weaker textures, inconsistent field performance, chlorosis, leaf spotting, and increased mildew driven by the unusual mix of warmth and intermittent moisture.

melons



Cantaloupe: Supplies are improving as

production shifts from Zacapa to two new regions that are helping stabilize availability. Sizing is mainly 9s with some jumbos and 12s. Quality is strong, with firm fruit, slightly greener exteriors, and excellent internal quality.

Honeydew: Demand continues to exceed supply, though relief is expected as new Guatemalan fruit arrives at Florida ports. Production is mainly 5s and 6s, with some jumbos and limited 8s. Supply should gradually improve, but the market will remain tight in the near term.

mushrooms



Supplies remain light, though demand is good. Quality has improved, with fewer gnats present in packs. The industry is entering peak mushroom season, and improved supplies and quality are expected next month.

onions



RADAR Supplies remain strong with good quality. Overall pricing is slightly below last year. Market prices for white and yellow continue to rise, while reds remain steady.

onions green



EXTREME Supplies remain very limited, and reduced availability is expected to continue in the coming weeks. Market pricing will stay escalated as demand increases. Quality is only fair, and both limited volume and elevated prices are likely to persist for several weeks.

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



Market UPDATE

pears cont...



the crop could exceed 400,000 tons, returning to pre-2022 levels, thanks to favorable spring weather and improved orchard management.

peppers bell



West and Central Mexico remain adequately supplied in 11 lb and 25 lb packs despite some weather-related slowdowns. Quality is generally good, with discounted lower grades, and temporary greening from cool, wet weather should improve as conditions stabilize.

peppers chili



Florida supplies are at seasonal lows, with mostly older fields and limited availability beyond jalapeños until spring harvests ramp up in mid- to late March. Western production from Sinaloa and Central Mexico is providing moderate volumes of jalapeños, serranos, and Anaheims with good quality. Tomatillos remain tight following earlier rainfall, though peeled product is performing better and showing gradual improvement.

pineapples



RADAR Early signs of market tightening are emerging, though conditions remain stable for now. Quality is good, but sizing may become more variable in the coming weeks, so flexibility on size selection will be important as the market develops.

potatoes



Idaho russets are now shipping from storage, with this season's crop showing clear improvements in both quality and size profile.

Larger sizes are more readily available compared to last year. Market pricing remains stable, and supplies are abundant—making it an ideal time to promote.

squash



Weather disruptions in Florida and Mexico have sharply reduced production—especially zucchini—as cool and near-freezing temperatures limited pollination and caused bloom drop. Availability is the primary challenge, though quality varies by region, with zucchini reported as good and yellow squash as fair to good. Weather issues in Mexico have also delayed expected overlap with new production blocks. As temperatures warm, gradual improvement is expected in both eastern and western regions, barring further rain.

tomatoes



Florida volumes are lighter than usual, with Naples harvests steady but impacted by recent cold and rain that may modestly reduce grape yields. Fruit is trending larger with strong quality. Mexico's supply is moderate but slowed by cool weather, with Baja winding down, Central Mexico in light winter production, and Sinaloa expected to ramp up in 2–3 weeks. Quality remains good across regions.



Market UPDATE

in the news...

US Ice Storm Forecast Map: Which Areas Will Be Worst Hit By Freezing Rain, Heavy Snow?

A massive winter storm named fern is set to sweep across much of the United States, bringing snow, ice and extreme cold. Over 230 million people could be affected, with major travel and power disruptions expected.

Dimple Singh | January 23, 2026 | [Timesnownews.com](https://timesnownews.com)

A powerful winter storm named winter storm fern is set to hit the eastern two-thirds of the United States this weekend. It will bring a dangerous mix of heavy snow, freezing rain, sleet and bitter cold.

Weather experts warn the storm could affect over 230 million people. Travel disruptions, power outages and life-threatening cold are expected from Texas and New Mexico to the Midwest, South and Northeast.

Forecasters say the storm began forming over the Southern Rockies and will strengthen as it moves east from Friday through Monday. According to the National Weather Service and The Weather Channel, the storm will deliver heavy snow in northern areas, damaging ice in the South, and freezing rain and sleet in between.

Why Is This Storm Dangerous?

Ice can make roads, trees, and power lines dangerous, causing power outages and blocked roads. Some places in the Northeast could get over a foot of snow, making travel very difficult.

After the storm, very cold temperatures are expected. This can cause frozen pipes, health risks from the cold, and longer power outages for people without heat. The cold may stay even after the snow and ice are gone.

Many big cities have winter storm alerts, including Dallas, Houston, Nashville, Atlanta, Chicago, Washington DC, Philadelphia, New York City, and Boston.

The South and Midwest are at high risk of ice storms, while the Northeast and Great Lakes could get heavy snow. Rural areas may take longer to recover if ice or snow damages power lines or



roads.

Snow And Storm Advisory

Snow, sleet and freezing rain will begin spreading across parts of Kansas, Oklahoma, Texas, New Mexico and Colorado on Friday. Travel could...

[Read full article HERE](#)

winter weather ALERT

Our valued produce partners in the storm's path are closely monitoring conditions to ensure the safety of their drivers remains the top priority. As a result, deliveries may experience delays or be temporarily paused in affected areas until the storm has safely moved through.

If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to ihoppe@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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