

Market OUTLOOK

Week 8: Feb 16– Feb 22, 2026



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Market ALERT

Apples
Asparagus
Beans
Berries
Broccoli
Brussels Sprouts
Carrots
Cauliflower
Celery
Cucumbers
Cilantro
Green Onions
Lettuce
Oranges
Peppers
Squash
Tomatoes

transportation

Nat'l Diesel Avg: \$3.688↑

Last Year: \$3.665↑

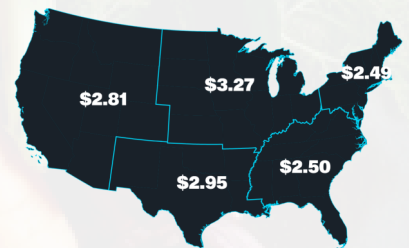
Nat'l Fuel Surcharge: \$0.44

Shortages: Rates are flat

- extreme - CA & FL
- slight - 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 showers, with some sun on Friday with highs in the 50s and 60s and lows in the 40s and 50s.

Salinas, CA: Cloudy and showers with highs in the 50s and lows in the 30s and 40s.

Yuma, AZ: Cloudy and sunny skies with highs in the 60s and 70s and lows in the 40s and 50s.

Immokalee, FL: Partly cloudy and sunny skies with highs in the 80s and lows in the 50s with some AM thunderstorms on Monday.

Idaho Falls, ID: Mostly cloudy skies throughout the week with highs in the 30s to 50s and lows in the 20s and 30s with snow to rain on Tuesday.



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Market UPDATE

apples



ALERT Prolonged September heat required heavy irrigation to protect tree health and maintain fruit quality, but it also pushed 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, leaving 125/138 counts in very limited supply. Markets are expected to firm, 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 expected to remain at premium market levels, and customers are encouraged to plan for alternative fruits when small-size needs cannot be met.

asparagus



ALERT The market remains firm heading into the week of 2/16, driven by lighter-than-expected Mexican production and delayed harvest progression in key growing regions. Early February demand pulled product ahead of actual field volumes, creating spot shortages and forcing size substitutions, especially on larger counts. As Caborca output improves, some stabilization is expected, but availability will stay tight through mid-February. Overall quality remains good.

avocados



Overall supply remains adequate, though the size curve continues to trend smaller as the season progresses. Medium and large fruit are still widely available, while smaller counts are tightening, placing upward pressure on select sizes. Quality is strong, with good internal maturity and oil content, though minor cosmetic issues may appear due to longer transit times and variable weather. Demand is steady following early-

February promotions, with mostly stable pricing and size-based fluctuations.

bananas



Supplies are steady with reliable shipping and balanced markets. Demand and pricing remain stable, with no disruptions expected. Quality is good overall, but watch for cosmetic issues like scarring and blemishes in coming weeks due to longer transit and variable weather.

beans



Green Beans: **ALERT** Markets are unsettled as ongoing weather risks in the Southeast—including freeze concerns and uneven field conditions—continue to disrupt harvest schedules. Western production and Mexican crossings are helping offset some gaps, but supplies remain inconsistent, resulting in market volatility. Quality has been variable due to recent temperature swings, and pricing remains elevated with limited relief expected in the near term.

berries



Blackberries: Production continues in Central Mexico. Supplies have tightened as crops move past their seasonal peak, reducing availability. Quality remains good.

Blueberries: **ALERT** Demand continues to exceed supply. Production in Central Mexico is ongoing, but volumes are tight as crops move past their seasonal peak. Quality and sizing from Mexico remain very good. Limited availability is expected over the next several weeks as South American and Mexican volumes decline, and early Florida fruit may not contribute in March. Early reports indicate freeze-related losses in Florida, potentially catastrophic for the early spring crop.



Market UPDATE

berries cont...



Raspberries: **ALERT** Production continues in Central Mexico and Baja. Supplies have tightened as crops move past their seasonal peak, reducing availability. Quality remains good.

Strawberries: **ALERT** Oxnard production continues to increase with very good quality and large sizing, while Santa Maria and Watsonville have begun light harvests; however, heavy rain in the next 7–10 days could reset fields and delay volume gains across California. Baja supplies—both conventional and organic—are ramping up with strong quality, though rain may cause minor disruption. Central Mexico is declining seasonally with generally good quality and some bruising. Florida volumes remain limited after multiple freeze events caused field damage, but the fruit that is being packed continues to show very good quality with medium-to-large sizing.

broccoli



Broccoli: **ALERT** Supplies remain very limited as growers continue to battle field-level quality issues such as brown bead and pin rot, tied to fall rains in Yuma, AZ. Demand is strong, and availability will stay extremely tight for the next several weeks. Quality will remain only fair.

Broccolini: **EXTREME** Supplies are very light this week as demand increases in response to regular broccoli shortages. Lower yields are pushing markets higher. Expect elevated pricing and stressed supplies for the next several weeks.

brussels sprouts



ALERT Supplies have improved this week, and quality is reporting stronger as well. Availability is expected to continue increasing over the next few weeks. Market pricing should ease as Mexican volumes build.

cabbages



Supplies continue to improve as yields and quality strengthen. Demand has softened, which has helped settle markets. Quality is good, and supplies should continue improving over the coming weeks.

carrots



ALERT The U.S. market remains tight as heavy rain and cold temperatures in California—particularly around Bakersfield—continue to disrupt harvests, reduce yields, and trigger prorations. Larger-size carrots (Tables, Clips, Jumbos) are currently unavailable, with a 3–4 week gap expected before supplies return. Conditions are likely to stay pressured through the end of the Bakersfield season until production shifts to the Imperial Valley in mid-February, where early outlooks are favorable but still carry some risk. Limited support from the Southeast helps but cannot offset California's shortfall.

cauliflower



EXTREME Growers are experiencing low supplies this week, and volumes are expected to remain constrained for the next three weeks. Warmer-than-normal weather has stressed winter-planted crops, leading to reduced production. Markets are anticipated to remain volatile with continued upward pressure. Quality concerns have also been reported, including darker yellow crown coloration and post-harvest mildew development, which appears as black spotting.

celery



EXTREME Unprecedented weather patterns in both the Oxnard, CA, and Yuma, AZ growing regions have negatively impacted celery yields.



Market UPDATE

celery cont...



Weather-related stress continues to hinder crop performance. Demand has remained steady, keeping markets elevated. Growers expect similar supply constraints and firm market conditions to persist over the next three weeks.

citrus



Limes: Markets are active with balanced Mexican supply and supplemental Colombian fruit. Size distribution is even, though smaller fruit can be tight regionally. Quality is good. Markets are steady to slightly higher with consistent demand.

Lemons: California supplies are tightening, with sizing skewing larger and fewer small-fruit options. Demand is strong, keeping markets firm. Quality is good, but size flexibility is limited. Pricing likely remains elevated through February.

Oranges: **ALERT** California Navel oranges 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 Valencias. 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



ALERT Florida's frost had minimal immediate effect due to already low volume, keeping most buyers reliant on Western supply with limited

Honduran product. Spring crops show mixed frost damage and point to lighter-than-normal upcoming supply. Mexico continues to ship moderate, strong-quality volume, though fruit may be slightly thinner until weather normalizes. High demand is keeping product moving quickly.

grapes



Import volumes are strengthening, led by Peru and growing Chilean shipments, helping stabilize the market. Pricing is increasingly variety-driven: premium greens face the most pressure due to tight supply and strong West Coast demand. Red and black remain more balanced. Europe is stable and promotion-focused, while North America continues to drive overall demand. Availability should improve soon, though green varietal gaps may keep prices elevated in some areas.

herbs



Availability is mixed. Cilantro and parsley continue to show intermittent tightness driven by weather impacts in both desert and coastal growing regions. Cooler temperatures have slowed growth, reducing harvest volumes and contributing to occasional quality issues such as yellowing and shorter shelf life. Demand remains steady across both retail and foodservice, keeping markets firm to slightly higher.

Cilantro: **ALERT** Supplies remain light with fair quality. Strong demand and ongoing growing transitions in Oxnard, CA and Mexico are pushing markets higher. Expect tight supplies and elevated pricing through the next several weeks.

kale



Supplies have improved and demand is steady. Quality is fair but consistent. Product is shipping from both Oxnard and Yuma with stable market pricing expected for the next few weeks.



Market UPDATE

lettuce



Green & Red Leaf: Supplies are lighter this week, and demand remains strong. Quality is reported as fair, with some outer-leaf issues, and both sizing and weights are running light. Market pricing is steady for now but trending higher. With lower supplies expected in the coming weeks, markets are likely to react accordingly.

Iceberg: **EXTREME** Yields and ongoing quality challenges have significantly reduced overall acreage, and many growers are falling short of normal harvest volumes. Value-added processors have also entered the market to secure acreage, further tightening supplies. Demand outpaces available volumes, keeping markets elevated.

Romaine: **ALERT** Supplies are lighter with only fair quality, including some outer-leaf issues and reduced weights. Markets remain active. Early crop maturity is forcing growers to harvest ahead of schedule, likely creating supply gaps.

Tender Leaf: **ALERT** Supplies remain light as growers continue facing weather-related quality issues. Temperature and moisture swings have reduced yields, weakened leaf structure, and increased issues such as chlorosis, spotting, and mildew. Supply and quality pressures will continue in the short term.

melons



Cantaloupe: Arrivals remain steady in the East but will dip next week as production shifts back to Zacapa. Supplies are expected to tighten through mid-February, then improve late month and return to normal by early March. Demand is rebounding, and quality is good, with larger peak sizing and limited smaller fruit.

Honeydew: Supplies are expected to dip briefly as sourcing shifts before recovering later in

mushrooms



Supplies remain light but demand is strong. Quality is gradually improving, with fewer gnats reported in packs. As the season approaches its peak, supplies and quality are expected to improve further next month.

onions



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

onions green



EXTREME Following the holiday period, labor shortages in Mexico disrupted harvest activity, affecting the country's typically year-round supply. Warmer weather also accelerated production ahead of schedule. Although labor levels have since stabilized, supply gaps are emerging as new acreage matures. Active markets are anticipated over the next three to four weeks, with demand continuing to outpace supply and keeping pricing elevated.

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



Market UPDATE

peppers bell



ALERT Mexico's volume is low to moderate, with overcast weather slowing color development and causing greening. West Mexico may see additional declines from virus pressure and earlier crop stress, though quality stays good. Supplies should remain limited until Canadian production increases in mid- to late-March.

peppers chili



ALERT Florida production has fallen sharply after cold weather wiped out many older fields, leaving only limited usable supply. Meaningful volume isn't expected until spring plantings start in about six weeks; Cubanelles will be especially scarce since Florida is the only active region. Western supplies are better, with moderate pepper availability, but tomatillos remain extremely short due to rain-related quality issues and insect pressure for another 10–14 days. Jalapeño yields may also decline as insect damage increases.

pineapples



Production will tighten in the coming weeks, though near-term supply remains manageable. Harvest timing is being adjusted to boost maturity and quality, while weather-related constraints are limiting crownless volume and firming spot prices. Maintain flexibility on sizing and continue close quality monitoring as the market evolves.

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



ALERT Supplies are very tight after Florida's frost heavily damaged fields, though the fast growth cycle should allow limited recovery by early March and better volume by mid- to late-March. Mexico is also tight on yellow squash due to earlier rain and cool weather, while zucchini volume is light to moderate. Quality ranges from fair to good. Expect short-term tightness with gradual improvement as new plantings begin harvesting.

tomatoes



ALERT Florida's frost will tighten supplies in the coming weeks, with the largest gap expected mid-March through April as damaged Ruskin/Palmetto fields drop out. Southern Florida will keep producing at reduced yields. Mexico has moderate, fair-to-good quality volume that should improve through February, helping offset tightening Eastern supply.



Market UPDATE

in the news...

The Best Produce to Buy if You Want to Cut Down on Grocery Spending

Seek out these ingredients to spend less money at checkout and ensure your fresh produce lasts longer.

Marnie Shure | February 11, 2026 | Yahoo.com

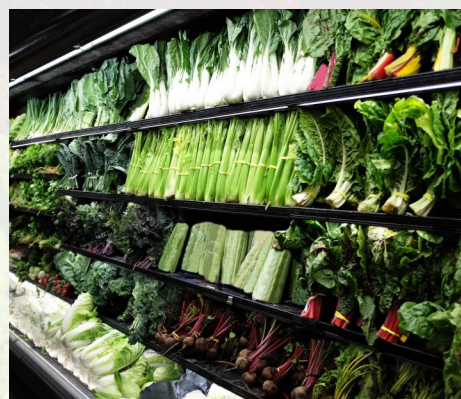
Key Points

- With grocery prices still climbing, produce remains one of the best ways to save money at the supermarket — especially when you choose budget-friendly, long-lasting options.
- Using USDA data adjusted with the Bureau of Labor Statistics inflation calculator, this report highlights six affordable staples that offer excellent value and versatility.
- With proper storage, these everyday ingredients can stay fresh for weeks, helping home cooks cut down on food waste and stretch their grocery budgets further.

After steady increases in grocery prices over the past six years, it's difficult to remember the days when a trip to the supermarket didn't end in

sticker shock. The average price of eggs has finally fallen after reaching record highs last spring, but staples like beef, orange juice, chicken, bacon, and coffee are still more expensive than this time last year. As grocery bills creep higher, shoppers might consider ingredient swaps to stretch their dollars further — and the produce department is a great place to start.

Fresh produce is a core part of our grocery lists every week, but the prices of fruits and vegetables can vary widely. We analyzed data from the United States Department of Agriculture's (USDA) Economic Research Service — originally collected in 2023 — and used the U.S. Bureau of Labor Statistics (BLS) CPI inflation calculator to account for price changes and determine which types of produce will likely cost you the least at grocery stores today.



baranozdemir / Getty Images

But saving money on fresh produce isn't just about price. If you buy a leafy green that turns slimy in three days and end up throwing half of it out, it doesn't matter how much you paid...

[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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