

# Market **OUTLOOK**

Week 9: Feb 23– Mar 1, 2026



## Market **ALERT**

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

## transportation

Nat'l Diesel Avg: \$3.711↑

Last Year: \$3.677↑

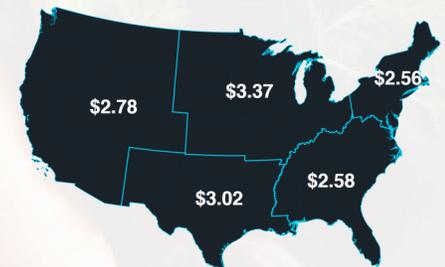
Nat'l Fuel Surcharge: \$0.44

Shortages: Rates are flat

- **extreme** - AZ & CA
- **slight** - CA & FL

### National Posted Rate per mile

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



## weather **OUTLOOK**

**Oxnard, CA:** Mostly cloudy with highs in the 70s and lows in the 50s.

**Salinas, CA:** Cloudy with highs in the 60s and 70s and lows in the 50s with showers on Tuesday.

**Yuma, AZ:** Partly cloudy and sunny skies with highs in the 80s and 90s and lows in the 60s.

**Immokalee, FL:** Sunny and partly cloudy throughout the week with highs in the 60s to 80s and lows in the 30s and 50s.

**Idaho Falls, ID:** Partly cloudy throughout the week with highs in the 40s and lows in the 30s with PM shower on Tuesday.



# 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 Peruvian season has effectively ended, and Mexican production continues to lag due to cool weather and slow field development. Supplies lean heavily toward larger sizes, with limited size flexibility and inconsistent U.S. arrivals. Demand is strong as buyers shift from other tight green vegetables, keeping markets elevated and reducing promotional opportunities. Quality is acceptable overall, but weather stress is shortening shelf life, making fast turns important. No near-term relief is expected, and intermittent shortages are likely through late February.

## avocados



Supplies remain strong, supported by steady Mexican harvests, with good availability on medium and large sizes. The season is pushing pricing upward on small fruit, while larger counts remain more favorable. Demand is steady following early-year promotions, and quality is strong with good dry matter and oil content.

Markets are stable overall, though gradual firmness on small sizes is expected as February rolls into March.

## 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 the coming weeks due to longer transit and variable weather.

## beans



**ALERT** Florida supplies remain severely impacted following recent freeze events that caused significant field damage despite all standard frost-protection efforts. Production is extremely limited and inconsistent, and another cold front with near-frost temperatures and high winds is expected to add further pressure. Mexico is also experiencing reduced availability, with many growers temporarily out of product and FOB levels exceeding \$50. Shippers are prorating, and some have called AOG. Florida supply is not expected to resume until mid-March, and substitution—such as snow peas or asparagus—is strongly recommended where applicable.

## berries



**Blackberries:** Volumes are past peak and will remain light, with similarly limited numbers expected over the next couple of weeks.

**Blueberries:** **ALERT** Demand continues to exceed supply. Import volumes from Peru and Chile continue to decline, and this trend will persist for the next few weeks. Central Mexico remains below last season's levels, with steady but not high volume expected.

**Raspberries:** **ALERT** Baja is past peak and



# Market UPDATE

## berries cont...



beginning to decline. Central Mexico is also trending down. Expect light decreases over the next couple of weeks before stabilizing. Good promotional opportunities remain despite a firmer market.

**Strawberries: ALERT** Rains have settled in California. If the forecast holds, Oxnard should resume harvesting Friday/Saturday. Santa Maria will likely need to strip fields and may be down a few days for cleanup. Central Mexico and Florida continue with strong volumes. Supply should remain stable with flexibility in loading locations. Early-week volumes look steady; rain will determine the rest of the week. Another storm is forecast for next week.

## 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. 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 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



Supplies and quality are improving, with availability expected to continue building over the next few weeks. As Mexican volumes increase, market pricing should ease.

## 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-sized carrots (Tables, clips, and 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** Supplies are limited and expected to remain constrained for the next three weeks as warmer-than-normal weather stresses winter-planted crops and reduces production. Markets are likely to stay volatile with continued upward pressure. Quality concerns are also emerging, including darker yellow crown coloration and post-harvest mildew that appears as black spotting.

## celery



**EXTREME** Unprecedented weather in both the Oxnard and Yuma growing regions continues to suppress yields, with weather-related stress limiting crop performance. Demand remains steady, keeping markets elevated. Growers expect similar supply constraints and firm conditions to persist for the next three weeks.



# Market UPDATE

## *citrus*



**Limes:** Availability has improved slightly, especially on larger sizes, which are more accessible than smaller counts. Mexico continues to drive supply, with Colombia supplementing as needed. Demand is steady but not aggressive, allowing for slight market softening from early February highs. Quality is good overall, though sizing remains inconsistent and requires careful spec management. Conditions point to relative stability through month-end.

**Lemons:** California supplies are adequate, but the crop is trending larger as the season progresses. Smaller sizes are tightening, supporting markets, and limiting size-specific flexibility. Harvests remain steady, though slightly below last year. Demand is stable across channels, and quality is strong. Expect continued size constraints and steady pricing through late 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** Supplies are steady, mostly sourced from Honduras, with Florida still largely out after cold weather. Early Florida spring crops may begin in

early March, but normal volumes will lag until mid-March. West/Mexico supplies are moderate but slightly lighter, with good quality aside from some sizing issues. Volumes should increase in 10–14 days if dry weather continues.

## *grapes*



Pricing is beginning to stabilize, but pressure on premium green remains high, with West Coast availability issues creating pockets of tightness. Peru continues to lead supply, while increasing Chilean volumes are helping support overall availability. Even with improving flow, varietal imbalances—especially among higher-tier green grapes—persist and will continue to influence pricing and procurement decisions in the near term.

## *herbs*



Markets remain pressured, especially for tender leaf varieties, as cool temperatures and disease pressure in desert regions reduce harvestable acreage. Basil and other soft herbs are more available but still require close monitoring due to shelf-life sensitivity. Demand is steady, and buyers should remain flexible on pack sizes and origins.

**Cilantro:** **ALERT** Supplies remain light with fair quality. Strong demand and ongoing growing transitions in Oxnard 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. The 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, and demand remains strong. Quality is fair, with some outer leaf issues, and both sizing and weights are running light. Pricing is steady for now but trending higher, and with lower supplies expected in the coming weeks, markets are likely to firm further.

**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



Arrivals in the East remain steady, but volumes will dip next week as production shifts back to Zacapa, with more consistent availability expected by early March. Demand is rebounding after a brief post-storm slowdown. Cantaloupes are skewing larger, tightening smaller sizes, while overall quality remains excellent. Honeydews continue to show strong internal condition and solid brix levels.

## 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 whites have decreased, while yellow and reds remain steady.

## onions green



**EXTREME** Labor shortages in Mexico following the holiday period disrupted harvests, and warmer weather pushed production ahead of schedule. Although labor has stabilized, supply gaps are emerging as new acreage comes online. With demand continuing to outpace supply, active markets and elevated pricing are expected over the next three to four 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 the crop could exceed 400K tons, returning to pre-2022 levels, thanks to favorable spring weather and improved orchard management.

## peppers bell



**ALERT** Mexico's supplies remain light—especially red bells—as West Mexico shifted early fruit to green, reducing later-colored volume. Central Mexico is also light, with inconsistent quality and



# Market UPDATE

## peppers bell cont...



greening. Meaningful relief is not expected until Canadian greenhouses begin in early March. Markets are active and trending higher, though no prorates are anticipated.

## peppers chili



**ALERT** Florida supplies are extremely limited after cold weather, with minimal jalapeño/poblano volume and almost no Cubanelle or serrano; recovery is expected in 4–6 weeks, and more improvement is expected once Plant City begins in mid-April. Western supplies from Sinaloa are low to moderate but adequate except for tomatillos, which remain severely short until Sonora starts in mid- to late March.

## pineapples



**RADAR** Production volumes are tightening over the coming weeks, though near-term supply remains manageable. Growers are shifting harvest dates to improve maturity and overall fruit quality. Weather continues to challenge crownless fruit, further pressuring availability. Spot market pricing is beginning to rise. Flexibility on sizing and ongoing quality monitoring are advised as conditions evolve.

## 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** Florida supplies are extremely limited after major cold damage, with minimal production expected for the next month; replanted fields may recover by mid-March. Remaining quality is average. Mexico provides moderate zucchini and tighter yellow squash volumes, with fair-to-good quality and some cosmetic defects.

## tomatoes



**ALERT** Supplies remain below normal in Florida and Mexico due to cold weather, earlier rains, and plant stress. Florida’s romas are most limited, with tighter volume until Estero and later Palmetto/Ruskin begin. Rounds and grapes are also light from cold damage and bloom drop. Mexico has light-to-moderate roma and round production with variable quality; grape tomatoes show fair-to-good quality with gradual improvement as weather stabilizes.



# Market UPDATE

*in the news...*

## Supreme Court Strikes Down Use of Emergency Powers for Trump's Tariffs

*In a major decision, the Supreme Court rules President Trump exceeded his authority by imposing tariffs using national emergency laws.*

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In a landmark ruling with major implications for U.S. trade and agriculture, the Supreme Court has struck down President Trump's use of emergency powers to impose sweeping tariffs. The 6-3 decision confirms that the International Emergency Economic Powers Act (IEEPA) does not give the president authority to issue broad import duties.

The Supreme Court case known as "Learning Resources Inc. v. Trump" is an end to a legal battle that started nearly a year ago. The tariffs at issue, which were originally imposed under the International Emergency Economic Powers Act (IEEPA), were first challenged in court in April 2025 when companies, including educational toy makers Learning Resources and hand2mind, sued in federal court shortly after the duties were announced. Justices Samuel Alito, Clarence Thomas and Brett Kavanaugh

dissented.

In the case Learning Resources Inc. v. Trump the court ruled, "We claim no special competence in matters of economics or foreign affairs. We claim only, as we must, the limited role assigned to us by Article III of the Constitution. Fulfilling that role, we hold that IEEPA does not authorize the president to impose tariffs."

"IEEPA gives the president significant authority over transactions involving foreign property, including the importation of goods. But in that generous delegation, one power is conspicuously missing," said the decision. "Nothing in IEEPA's text, nor anything in its context, enables the president to unilaterally impose tariffs. And needless to say, without statutory authority, the president's tariffs cannot stand."

The Court's ruling on Friday has major



Trade tariffs steel (MGN)

implications.

Initially, grain futures weakened after the ruling. Soybeans turned lower on fears the decision takes away a key bargaining chip ahead of Trump's April meeting with Chinese leader Xi Jinping, raising questions about whether Beijing will follow through on additional soybean purchases. The ruling...

[Read full article HERE](#)

*produce in* **PEAK** *for February*

Acorn Squash	Citrus	Persimmons
Bananas	Greens	Shallots
Beets	Kumquats	Turnips
Cauliflower	Mushrooms.	

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](mailto: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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