

Market OUTLOOK

Week 7: Feb 9– Feb 15, 2026



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Market ALERT

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

transportation

Nat'l Diesel Avg: \$3.681↑

Last Year: \$3.66↑

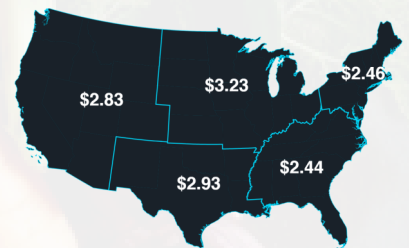
Nat'l Fuel Surcharge: \$0.44

Shortages: Rates are flat

- extreme - AZ, CA, FL & TX
- slight - AZ, CA, & FL

National Posted Rate per mile

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



weather OUTLOOK

Oxnard, CA: Cloudy, showers, and sunny skies throughout the week with highs in the 70s and 60 and lows in the 50s.

Salinas, CA: Cloudy and showers with highs in the 60s and lows in the 40s with sunny skies on Thursday.

Yuma, AZ: Cloudy and sunny skies with highs in the 70s and 80s and lows in the 50s.

Immokalee, FL: Sunny skies with highs in the 80s and lows in the 50s with partly cloudy on Wednesday.

Idaho Falls, ID: Cloudy and sunny skies throughout the week with highs in the 40s and lows in the 20s with AM showers on Monday.



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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



Availability remains limited, particularly in larger sizes, as colder West Coast weather continues to slow harvest progression. Demand is outpacing field production, keeping markets firm and prompting occasional size substitutions. This tight supply is expected to persist into next week as volumes gradually recover.

avocados



U.S. volume posted another 8% week-over-week decline but still reached a solid 73 million pounds heading into peak Super Bowl promotions. Over the past five weeks, arrivals have run 12% above early-2025 levels. Mexico continues to dominate with a 98% year-to-date market share. Despite a series of winter storms across the US, strong coordination throughout the supply chain has kept football-themed displays and promotional programs fully on track.

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 The market is experiencing significant instability due to freeze risks in the Southeast. Crop protection efforts and harvesting interruptions have triggered immediate prorated and sharply restricted supply. Pricing has escalated into the upper range, and a replacement gap is expected until weekend arrivals and early-week post-freeze assessments clarify the extent of actual crop loss. Quality will be variable, and elevated prices are likely to persist into next week as fields reopen and growers evaluate damage. Substitution pressure will remain high, and the broader market is expected to stay tight for 1–2 weeks before conditions begin to normalize.

berries



Blackberries: Supplies are somewhat light due to recent rains and cold temperatures in Central Mexico, likely lowering season-long volumes. Even with the dip, availability remains better than in previous years for this time of the season.

Blueberries: ALERT Import supplies continue to decline as both Peru and Chile wind down for the season—a trend expected to continue for several weeks. Central Mexico remains below last year's volume, with no major uptick expected. Organic blueberries remain in a strong position with solid numbers and are projected to finish the import season better than conventional.



Market UPDATE

berries cont...



Raspberries: Supplies remain strong with increasing volume out of Baja. Central Mexico's production dipped slightly from last week, but Baja's growth more than offsets the decline. Expect good opportunities, especially on the West Coast.

Strawberries: California production remains steady. Demand is expected to rise due to challenges in other growing regions and upcoming holiday loading. Central Mexico is past peak, with last week's cooler temperatures slowing production and likely to continue impacting yields. Florida faced prolonged record lows and strong winds, requiring multiple nights of freeze protection; potential damage from ice formation and windburn is still being assessed.

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 fair at best.

Broccolini: **ALERT** Supplies are light as demand increases in response to ongoing broccoli shortages. Lower yields are pushing markets higher, and elevated pricing is expected to persist. Supplies will be stressed for several weeks until yields stabilize.

brussels sprouts



EXTREME Supplies remain short, with only fair quality reported. Mexico is running behind on production this year, and persistent quality challenges continue to pressure availability. Slow improvement is expected, but supplies will remain below normal for the next few weeks.

cabbages



until new Mexican regions begin harvesting.

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



ALERT Supplies are light with only fair quality, including issues such as yellowing and mildew. Limited availability continues to drive market prices higher. Expect elevated markets and stressed supplies for the next few weeks.

celery



ALERT Supplies remain light, and demand has been increasing in recent weeks. The Yuma region is providing some improved availability. Pricing is expected to stay elevated for the next few weeks, with gradual relief as supplies continue to ramp up.



Market UPDATE

citrus



Limes: Markets are firming as seasonal transitions tighten supply while demand holds steady. Prices reflect this upward pressure, a trend expected to continue in the near term.

Lemons: Supply levels remain workable with consistent quality. Seasonal demand trends continue, and size profiles are typical for this time of year. No significant changes are anticipated in the next 1–2 weeks.

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 Eastern supplies are extremely tight, with only light Honduran imports available and Florida not expected to re-enter production until mid-March. In the West, Mexican supplies have tightened following recent weather but continue to show good quality. Overcast conditions may limit sizing, keeping supplies adequate but not heavy. Improvement is expected as weather conditions gradually stabilize in Mexico over the coming weeks.

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



Overall supplies are steady, though a few items remain in tighter rotation due to seasonal constraints. Quality is consistently strong, and while demand remains healthy, any weather-related disruptions could trigger short-term gaps. Markets are stable heading into mid-February.

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. Product is shipping from both Oxnard and Yuma, with stable market pricing expected for the next few weeks.

lettuce



Green & Red Leaf: Supplies remain steady with good demand. Quality is fair, with some outer-leaf issues and lighter sizing and weights. Markets are stable for now but are trending upward, with tighter supplies forecasted in upcoming weeks.

Iceberg: **EXTREME** Supplies are very limited with



Market UPDATE

lettuce cont...



lighter weights and continued outer-leaf defects expected. Markets are highly active. Many fields matured 1–2 weeks early, forcing accelerated harvests over the past month and creating gaps in supply. These challenges are expected to persist for 3–4 weeks.

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 additional supply gaps in coming weeks.

Tender Leaf: **ALERT** Supplies remain light as growers continue facing weather-related quality issues across arugula, spinach, spring mix, and similar items. 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, with lighter volumes expected next week as production shifts back to Zacapa. Supplies should tighten through mid-February before improving late in the month and normalizing by early March. Demand is already rebounding after last week's storm. Quality is good, with larger peak sizing and tighter availability on smaller fruit.

Honeydew: Supplies are expected to dip briefly as sourcing shifts before recovering later in February. Demand is strengthening with market restocking. Quality is strong, with good brix.

mushrooms



Supplies remain light, but demand is strong.

onions



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

onions green



ALERT Supplies remain limited as growers report ongoing availability challenges. This trend is expected to persist for several weeks. Demand is high, keeping pricing elevated. Quality remains fair, and supplies will stay tight.

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



Mexico's supplies are running low to moderate across both Central and West Mexico. Central Mexico is expected to strengthen in volume in approximately two weeks, weather permitting. Persistent overcast conditions may slow color development, leading to some greening in mixed packs. West Mexico's volumes may trend lighter as growers harvest early greens, though overall quality remains good.



Market UPDATE

peppers chili



ALERT Supply remains constrained nationwide. Florida production is at a seasonal low, with Cubanelles especially scarce. Quality on older Eastern plantings ranges from fair to average, and continued cold weather poses short-term risks to current and upcoming spring crops. Western volume from Sinaloa is light to moderate with generally good quality; however, husked tomatillos are extremely limited due to persistent weather-related quality issues, increasing demand for peeled products and putting continued pressure on tomatillo availability.

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 remain extremely tight. Freeze risk threatens Eastern production, while Mexico is providing only limited relief due to weather-impacted sizing and a highly sensitive market.

tomatoes



ALERT Florida production remains well below normal as cold and rain have delayed harvesting in Naples, with grapes most affected. This has elevated pricing and led to some grower prorations. Roma are currently unavailable from Florida, shifting supply heavily to Mexico, while rounds remain limited and may exit Florida entirely by March. Mexico is also facing weather-related constraints: Baja is tapering off, Central Mexico is in a lighter winter cycle, and Sinaloa volume is expected to improve as temperatures warm despite recent rain and wind. Overall supplies remain tight, and grape availability is projected to worsen into March as remaining backstock is depleted.





Market UPDATE

in the news...

Berry growers in North and Central Florida face the devastating effects of the latest cold snap

Sandra Gutiérrez G. | February 3, 2026 | Freshfruitportal.com

The persistent extreme weather front that has hit the East Coast and central states in the US for the past two weeks has heavily impacted the blueberry and strawberry industry in North and Central Florida.

Despite multiple preparations, freezing temperatures going down to 20 degrees Fahrenheit have hit berry fields in the area, covering them with ice and snow.

Damage has not yet been quantified, but this latest cold snap could heavily jeopardize not only this year's crop, but the overall health of thousands of planted acres in the region.

Pre- and post-extreme cold weather preparations in Florida

As reported by Orlando local news outlet Fox 35, blueberry and strawberry growers in the state prepared their fields by using overhead irrigation, which is the industry standard freeze protection technique.

The method uses the constant spraying of water over field rows to create a thermoprotective layer of ice that preserves the temperature of the plant and berry above freezing. This usually works—unless the air gets too cold, and the heft of the ice breaks leaves and branches, or even topples over the entire plant. This is what happened in

Florida over the weekend.

"Growers are doing everything possible to protect crops, but with temperatures dipping below 20° in many areas, damage is not only expected, in some cases, it is already evident," said past Florida Blueberry Growers Association President, Brittany H. Lee, on a LinkedIn post published by the organization.

In a statement posted to the social media site, the Florida Blueberry Growers Association (FBGA) said it's watching closely the impacts of this week's winter storm, and urged growers to assess and document any losses.

"Preparing for potential federal assistance will be an important step. Our thoughts are with all growers navigating recovery and planning for the season ahead," the post reads.

The North American Blueberry Council (NABC) sent a message of support to growers in Florida and Georgia: "To our growers: We know how much heart goes into every acre." The organization also echoed the FBGA's call to action so growers can "protect their eligibility for federal assistance programs."

"It is critical that growers take clear photos and videos of damage as it occurs; contact their crop insurance



Photo by Florida Blueberry Growers Association via LinkedIn

agent immediately and continue working with them as the storm progresses to quantify losses; and contact their local FSA office right away to begin the application process for the Tree Assistance Program (TAP) and/or Emergency Conservation Program," reads the statement.

The human toll of a cold snap

Kasey Cronquist, President at the US Highbush Blueberry Council (USHBC), also took to LinkedIn to share his thoughts on the impacts of this historic freeze.

"What I'm hearing [from growers in Florida and Georgia] is sobering. For some, this is shaping up to be one of...

[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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