

Market OUTLOOK

Week 38: September 14-20, 2026



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Market ALERT

Asparagus
Berries
Brussels Sprouts
Cabbage
Cauliflower
Cilantro
Citrus
Green Onions
Iceberg Lettuce
Mushrooms
Peppers
Squash
Tomatoes

transportation

Nat'l Diesel Avg: \$5.967↓

Last Year: \$3.766↑

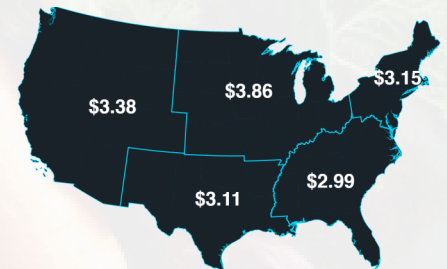
Nat'l Fuel Surcharge: \$0.86

Shortages: Freight market is steady

- **extreme** - CA, DE, MD, VA, & WA
- **slight** - CA, AZ, DE, MD, & VA

National Posted Rate per mile

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



weather OUTLOOK

Oxnard, CA: Mostly sunny skies with highs in the 70s to 80s and lows in the 60s.

Salinas, CA: Mostly sunny and partly cloudy skies with highs in the 70s and lows in the 50s.

Yuma, AZ: Sunny skies with highs in the 100s and lows in the 80s.

Immokalee, FL: Evening thunderstorms all week with highs in the lower 90s and lows in the 70s.

Idaho Falls, ID: Mostly sunny skies with highs in the 70s and lows in the 40s.



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Market UPDATE

apples



The Washington market is in a key seasonal transition as storage-crop inventories are largely exhausted and harvest of new-crop fruit expands. Gala and Honeycrisp supplies are improving, while Fuji, Golden Delicious, Pink Lady, and several other varieties remain tight due to limited carryover inventories. Strong school and foodservice demand is creating upward pricing pressure. Quality of new-crop fruit is excellent, and volume will continue to improve.

asparagus



ALERT The market remains extremely firm as North American production has largely finished and the U.S. continues to rely on Peru and Mexico. Jumbo and XL supplies remain especially limited, while strong retail and foodservice demand is keeping inventories tight. Freight costs, quality variability, and sizing challenges continue to constrain availability, particularly from Peru. Expect elevated pricing and remain flexible on size specifications. Quality is generally acceptable, though occasional tip opening and shorter shelf life may occur due to long transit times. Meaningful relief is not expected until October when additional volumes become available.

avocados



Supplies remain favorable, with Mexico as the primary source and supplemental volume from California and Peru. Larger sizes continue to command premiums, while mid-size fruit remains readily available. Inventories are sufficient to meet foodservice demand, and quality is generally very good.

bananas



Supplies remain stable with steady production,

reliable shipping schedules, and strong quality. Supply and demand are well balanced, keeping market conditions and pricing favorable.

beans



Green Beans: Supplies and quality have improved in the Northeast. Market prices remain steady.

berries



Blackberries: **ALERT** Demand remains strong as domestic production continues to decline and stays limited due to the heat wave. New Mexican production is increasing and should improve supplies week over week. Quality from Mexico is reported as good, and current volumes are sufficient to cover contract commitments.

Blueberries: **ALERT** Domestic supplies continue to decline rapidly, with only limited production remaining from the Pacific Northwest. Imports from Peru are helping supplement availability. Jumbo blueberry supplies are also winding down, and overall volumes are expected to remain light through September and October. Markets are expected to stay active as supplies tighten.

Raspberries: **ALERT** Domestic volumes remain very limited, especially following the Central California heat wave, and are expected to continue declining. Supplies from Central Mexico are increasing and should improve availability over the coming weeks. Demand is steady, quality is fair, and volumes are expected to increase week over week.

Strawberries: **ALERT** Volumes remain light from Watsonville/Salinas, with Santa Maria production increasing and additional supplies expected through the end of September. Demand is elevated while availability remains limited. Recent heat has created quality concerns, with overall quality reported as fair to poor. Supplies are expected to improve over the coming weeks.



Market UPDATE

broccoli



Broccoli: Supplies are steady, though demand has increased in recent weeks. Quality is fair, with pin rot and elevated insect pressure reported due to warm weather. Availability is expected to become more challenging over the next few weeks, keeping markets active.

Broccolini: Supplies are steady, though yields and availability are lighter due to the current heat wave. Quality is reported as fair. Supplies and markets are expected to remain generally stable, although prolonged warm weather could create additional supply pressure.

brussels sprouts



ALERT Supplies remain very limited and availability has tightened quickly. Reduced production and steady demand are expected to keep supplies constrained over the next few weeks, with active market conditions likely.

cabbages



ALERT Supplies remain light with reduced yields and fair overall quality. Insect pressure and ongoing heat are impacting production, and availability is expected to stay limited over the next few weeks with active market conditions.

carrots



Production has fully recovered following the transition to the Imperial Valley. Supplies are abundant, quality is excellent, and sizing has returned to normal. Strong availability is expected to continue.

cauliflower



ALERT Supplies are very limited as demand

increases. Quality remains fair, with elevated insect pressure impacting production. Ongoing supply gaps and pest pressure are expected to keep availability extremely tight and market conditions active over the next several weeks.

celery



Supplies and demand remain steady, with fair overall quality. Availability is expected to remain stable over the next few weeks, although increased insect pressure is anticipated due to the heat wave.

citrus



Limes: Supplies remain balanced, supported primarily by Mexico with additional volume from Colombia. Quality is generally good, although periodic weather-related fluctuations continue to affect sizing consistency. Availability of small and mid-sized fruit may vary week to week, but overall volume is sufficient to meet demand.

Lemons: **RADAR** Supplies remain adequate, but sizing continues to favor larger fruit, keeping smaller counts tighter. Quality is strong with good color and internal condition. Steady foodservice demand is supporting the market. Buyers seeking smaller sizes may continue to encounter limited supplies and higher pricing. Market conditions are expected to remain steady to slightly firmer through mid-September.

Oranges: **RADAR** Supplies remain stable with strong external and internal quality. Similar to lemons, sizing favors larger fruit while smaller counts remain harder to source. Demand has improved with schools back in session and steady foodservice activity. Markets are expected to remain generally stable, though limited small-fruit availability may continue to support higher pricing. Supply remains sufficient for normal purchasing needs.



Market UPDATE

cucumbers



Supplies are comfortable nationwide, with adequate Eastern production and improving Western availability as Baja volume increases. Quality remains solid, and supplies are expected to stay stable in the weeks ahead.

eggplant



Supplies remain steady with good availability across multiple growing regions. Eastern local programs, Fresno, Washington, and lighter Mexican production continue to support the market, with generally good quality and no significant near-term supply concerns expected.

grapes



California production is in full swing, with supply steady and market conditions fully normalized.

herbs



Supplies of basil, parsley, rosemary, oregano, thyme, mint, and specialty herbs remain balanced with good quality from California and Mexico. Demand is steady, and transit performance has improved as temperatures moderate. Markets are expected to remain mostly unchanged through the week.

Cilantro: ALERT Supplies are very light, and quality is only fair due to mildew and other field challenges. Demand remains strong, and continued heat is expected to create additional quality concerns while keeping supplies limited.

kale



Supplies are steady, and demand remains good. Quality is fair and supplies and market pricing are expected to remain stable.

lettuce



Green & Red Leaf: Supplies have declined in recent weeks, while quality remains fair due to warm weather, insect pressure, occasional tip burn, and signs of INSV. Softer demand has helped keep markets stable, though quality challenges are expected to persist.

Iceberg: ALERT Supplies remain light as demand continues to increase. Carton weights are trending lower, and quality is fair with reports of INSV, Sclerotinia, and increased insect pressure. Reduced yields and ongoing quality issues are expected to keep supplies tight and markets active.

Romaine: Supplies are generally steady, though demand has increased. Carton weights remain lighter than normal, with fair quality affected by tip burn, INSV, Sclerotinia, and insect pressure. Yields are inconsistent, and market conditions are expected to strengthen.

Tender Leaf: Supplies remain steady, though quality is only fair due to elevated insect pressure, higher temperatures, and humidity. Availability and pricing are expected to remain stable, but quality may continue to be inconsistent over the next few weeks.

melons



Cantaloupe and honeydew markets are strengthening after Labor Day, supported by retailer promotions. Cantaloupe quality is excellent, with mostly jumbo/9s sizing, strong color, and 13 to 15% Brix. Honeydew supplies are tightening, especially 6s and 8s, as production declines and demand outpaces supply. Quality remains strong (12 to 14% Brix), while Guatemala greenhouse transplants are underway to support future supply.



Market UPDATE

mushrooms



ALERT Supplies remain limited while demand continues to increase. Quality is fair, and labor shortages at farms are creating additional harvest challenges. Supplies are expected to stay tight through the remainder of the summer, with elevated market pricing.

onions



Idaho harvest continues to ramp up, with good overall quality and availability across all colors and sizes. However, super and colossal onions are expected to be tighter than normal due to extreme heat, wildfire smoke, and other challenging growing conditions that impacted sizing and reduced yields. Higher costs for seed, fertilizer, labor, and transportation are also adding pressure to the market. As a result, larger-size availability may remain limited, keeping pricing firm and creating potential for additional increases as the season progresses, particularly on jumbo-sized onions.

onions green



ALERT Supplies remain very limited as heat impacts yields and quality. Availability is expected to stay tight over the next several weeks, with active market conditions likely to continue.

pears



Washington availability is expected to improve steadily through September as harvest volumes increase. Bartlett availability will expand first, followed by Anjou, Bosc, and specialty varieties. Quality is reported as strong, with good color, sizing, and pressure. While demand typically rises with new-crop arrivals, the larger harvest should help maintain balanced market conditions and limit major price volatility.

peppers bell



Supplies remain readily available nationwide, supported by strong Eastern production and steady volumes from California and Washington. Quality is generally good, though weather has affected some Eastern areas, and production will gradually transition south in the coming weeks.

peppers chili



ALERT Supplies are light to moderate nationwide. Eastern production from Michigan, New Jersey, Ohio, and Pennsylvania is supporting availability, though jalapeños remain somewhat limited and serranos are the tightest item. In the West, jalapeño, poblano, and habanero supplies are also light, with Central Mexico, Baja, and Washington providing most volume and generally good quality.

pineapples



Costa Rica production remains 15 to 20% below normal and is expected to stay tight into next year. Strong juice demand tied to orange shortages continues to divert volume from fresh markets, keeping prices at record highs and larger fruit scarce. Quality remains excellent (13% Brix). Availability is expected to stay below seasonal norms through Q4.

potatoes



Idaho russet harvest is underway, with acreage down approximately 5-8% from last year, resulting in one of the smallest crops in the past decade. Early reports indicate good crop development, favorable sizing, and strong quality; however, concerns remain around limited water availability, above-normal temperatures, dry conditions, localized hail, and



Market UPDATE

potatoes cont...



thrip pressure. While yields currently appear solid, larger sizes could tighten if growing challenges persist through harvest. Market pricing has already begun to increase on larger-count potatoes, reflecting tightening availability. Overall, the market is expected to remain more balanced than last season, supporting firmer pricing and stronger market fundamentals, particularly on larger-sized potatoes.

squash



ALERT Supplies remain limited nationwide as Eastern summer programs wind down and Western production stays light. Quality is variable due to recent weather challenges, particularly on yellow squash, though availability should gradually improve as Eastern fall plantings and Sonora production come online.

tomatoes



RADAR Supplies are tight nationwide. Grape tomatoes are tightening in both regions, with Virginia providing the most consistent Eastern volume and weather impacting Western production in Mexico and Baja. Roma supplies remain limited due to reduced yields across the East, California, and Mexico, while round tomatoes are steady but constrained, with light Eastern production and light-to-moderate Western availability. Overall, supplies are expected to remain somewhat tight until additional Mexican acreage and later-season Florida production come online.





Market UPDATE

in the news...

Fruit byproducts lead food waste upcycling growth

Carla Espinoza Gutiérrez | September 7, 2026 | freshfruitportal.com

With What was once destined for the waste bin is increasingly becoming part of the produce business.

A recent report by research firm DataIntelto describes an expansion in the global food waste upcycling market, with fruit byproducts from processing operations being converted into fibers, antioxidants, prebiotics, and other ingredients.

The firm values the upcycling category at \$62.4 billion in 2025, with a projected compound annual growth rate (CAGR) of just over nine percent. If realized, the segment would reach \$138.7 billion by 2034.

The broader global food waste management market is projected to grow from \$65 billion in 2025 to \$109.8 billion by 2034, at a six percent CAGR.

The document identifies “increasing government pressure to minimize food waste, corporations setting more sustainability goals, and customers insisting on eco-friendly products” as key drivers.

For fruit processors, the expansion is creating opportunities to extract value from materials including pomace, peels, seeds, and pulp that traditionally have had limited commercial use and would otherwise be discarded.

While concrete economics depend on individual investments, the document says companies can achieve higher

margins from these offerings.

“Upcycled products are usually expensive, which results in larger profits for companies ready to invest in extraction and stabilization technologies,” the report stresses.

Upcycling turns waste into value-added applications

Processors can recover fiber, antioxidants, natural flavors and prebiotics from fruit byproducts, DataIntelto explains.

“Pomaces of apple and citrus fruits with high levels of pectin and polyphenols represent particularly valuable sources for manufacture of healthy, sugar-free products,” the assessment states.

Fruit and vegetable byproducts account for a significant share of the upcycled food market, which the report links to their availability, relatively low collection costs, and a demand for clean-label ingredients.

The market for upcycled prebiotic fiber nutraceuticals was valued at \$1.4 billion in 2025 and is projected to reach \$5.8 billion by 2034, a 17 percent CAGR, the firm says.

Recovered fruit ingredients can also be used in functional foods and beverages for properties such as thickening, stabilization, and sugar replacement. Other applications include snacks, nutraceuticals, and supplements, as

well as biodegradable films and compostable packaging made from fruit skins and seeds.

DataIntelto projects food-processing byproducts will account for the largest share of the upcycling market through 2034, citing their consistent availability and steady processing volumes.

North America leads market

Despite the expansion, the sector faces some challenges. These include variability in byproduct quality, a lack of standardized practices, and consumer concerns about ingredients derived from materials traditionally considered waste.

“Nevertheless, labels such as Upcycled Certified—the label is expected to reach 35.7 percent of claims by 2026—will help create credibility and differentiate premium products,” the report emphasizes.

North America currently leads adoption, representing nearly two-fifths of global sales of upcycled food products, according to DataIntelto. Japan and South Korea are also developing their markets, while online distribution accounts for the largest share of upcycled food sales.

New regulations such as the European Union’s Packaging and Packaging Waste Regulation (PPWR), which aims to reduce packaging waste and...

[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!

Your Dedicated NPC Powered by Foodbuy Staff