

Market OUTLOOK

Week 39: September 21-27, 2026



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Market ALERT

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

transportation

Nat'l Diesel Avg: \$6.285↑

Last Year: \$3.748↓

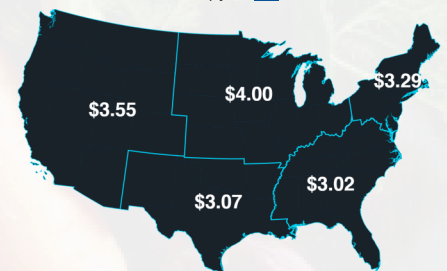
Nat'l Fuel Surcharge: \$0.92

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: Partly cloudy skies with some sun on Wednesday and over the weekend with highs in the 70s and lows in the 60s.

Salinas, CA: Partly cloudy with some sunny skies with highs in the 60s and 70s and lows in the 50s.

Yuma, AZ: Sunny skies all week with some clouds on Monday with highs in the 100s and lows in the 70s and 80s.

Immokalee, FL: Thunderstorms all week with overnight storms Saturday with highs in the upper 80s and lows in the 70s.

Idaho Falls, ID: Partly cloudy skies with some sun Wednesday and Thursday with highs in the 70s and 80s and lows in the 40s.



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Market UPDATE

apples



Washington production remains in a key seasonal transition. Storage crop inventories are largely exhausted, while new-crop Gala and Honeycrisp supplies continue to improve. Fuji, Golden Delicious, Pink Lady, Granny Smith, and several other varieties remain tighter due to limited carryover inventories. School and foodservice demand are adding pressure, particularly on certain sizes and varieties. New-crop fruit quality is excellent, with strong color, firmness, and eating quality. Supplies should improve as harvest expands, though strong demand is expected to keep markets generally firm, especially on Fuji, Golden Delicious, and premium club varieties.

asparagus



ALERT The market remains extremely challenged. Supplies continue to rely on Peru and Mexico as North American production has largely ended, with both regions experiencing lighter-than-desired availability. Jumbo, XL, and large sizes remain especially difficult to source, while standard and small sizes offer the best coverage opportunities. Strong retail and foodservice demand is keeping FOBs elevated and limiting market relief. Quality is generally acceptable, though occasional open tips, feathering, dehydration, sizing variation, and shorter shelf life may occur due to extended transit times. Conditions are expected to remain firm through September, with meaningful supply improvements not anticipated until October.

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** Supplies remain tight as weather challenges and ongoing rain in Mexico continue to limit production. Volumes are improving slowly, with more meaningful increases expected next week. Domestic availability remains limited, though Oxnard production is gradually increasing. Quality is only fair, and California production continues to decline as Mexico assumes a larger supply role.

Blueberries: **ALERT** Supplies remain limited as the domestic season winds down. Mexico continues shipping light volumes, with production increasing slower than expected. Remaining U.S. supplies are extremely limited, while Peru continues to increase shipments and is expected to become the primary source in the coming weeks, offering good quality and sizing.

Raspberries: **ALERT** Supplies remain light as the Watsonville season winds down. Recent heat provided a short-term production boost, but overall volumes continue to decline due to field cleanup and rain-related disruptions. Quality remains generally good. Supplies should stay limited through next week before improving as Mexican production increases.



Market UPDATE

berries cont...



Strawberries: California supplies remain light following recent heat across key growing regions. Overall production remains below forecast. Quality issues persist due to heat stress, and volume increases are expected to be gradual. Conventional supplies should improve as Southern California production ramps up, but markets are expected to stay active with ongoing quality concerns.

broccoli



Broccoli: **ALERT** Supplies are limited as demand continues to increase. Quality is only fair, with pin rot and elevated insect pressure impacting production. Availability is expected to stay tight over the next few weeks, keeping markets active.

Broccolini: **ALERT** Supplies are very limited due to reduced yields following recent heat. Quality is only fair, and market pricing remains elevated. Availability is expected to stay challenged over the next several weeks.

brussels sprouts



ALERT Supplies are limited and availability has tightened. Supplies are expected to stay light over the next few weeks, with continued demand likely to support higher markets.

cabbages



ALERT Supplies are light. Insect pressure and heat continue to impact yields and quality. Demand is good, and limited availability is expected to keep markets active over the next few weeks.

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



Supplies remain light as demand strengthens. Quality is fair due to increased insect pressure and challenges related to diamondback moth activity. Supplies are expected to stay short, keeping markets active over the coming weeks.

celery



Supplies remain steady with good demand. Quality is fair, and improved availability should support stable markets over the next few weeks. Insect pressure remains elevated following recent heat.

citrus



Limes: **RADAR** The market is trending firmer as Mexican production transitions to newer crop cycles. Reduced harvest volumes and seasonal factors are expected to support higher pricing. Quality remains mostly acceptable, though size flexibility is becoming increasingly important. Colombian imports continue to provide supplemental supply but are not sufficient to fully offset tightening Mexican availability.

Lemons: California supplies remain adequate across most sizes, supported by steady harvesting and good fruit quality. The market is generally balanced, though strong foodservice demand for larger fruit occasionally creates pressure on specific counts. Quality remains strong with good color, appearance, and juice content. Transportation conditions continue to support normal movement.

Oranges: **ALERT** California supplies remain



Market UPDATE

citrus cont...



available, though demand continues to favor larger fruit. Small sizes remain considerably tighter, creating occasional sourcing challenges. Quality is excellent with strong color, juice content, and internal maturity. Demand remains healthy from schools, retail promotions, and foodservice programs. Larger sizes should remain readily available, while smaller fruit stays comparatively tight. Markets are expected to remain firm through late September until additional seasonal volume develops.

cucumbers



Supplies remain adequate, supported by strong production in Eastern North Carolina, with additional volume from regional Eastern growers and Georgia's fall season building. Western availability is moderate, led by quality Baja supplies and supplemented by Sonora and Central Mexico production.

eggplant



Supplies remain adequate, with Michigan leading Eastern production and additional regional growing areas providing supplemental volume. As northern programs wind down, Georgia and Eastern North Carolina are expected to increase harvest activity. Western production remains steady with good quality, keeping supplies sufficient to meet current demand.

grapes



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

herbs



Supplies of basil, parsley, rosemary, mint, thyme,

oregano, and most specialty herbs remain readily available with good quality. Demand is steady but manageable, keeping markets balanced. Most other herb categories are moving without significant supply pressure.

Cilantro: **ALERT** Supplies remain very light with only fair quality due to mildew and other quality concerns. Demand remains strong, and heat-related challenges are expected to keep supplies tight and markets active.

kale



Supplies remain steady with good demand and fair quality. Markets are expected to remain stable, though insect pressure remains elevated due to warmer weather.

lettuce



Green & Red Leaf: Supplies remain light with only fair quality due to heat-related stress, insect pressure, tip burn, and occasional INSV. Stronger demand has pushed markets higher, and quality challenges are expected to continue.

Iceberg: **ALERT** Supplies remain very limited as demand continues to increase. Carton weights are lighter than normal, and quality is only fair with reports of INSV, Sclerotinia, and elevated insect pressure. Yields are expected to remain challenged in the coming weeks.

Romaine: Supplies remain light with increased demand and lighter carton weights. Quality is fair, with reports of tip burn, INSV, Sclerotinia, and elevated insect pressure. Reduced yields are expected to support stronger markets.

Tender Leaf: Supplies remain steady, but quality is only fair due to increased insect pressure and humidity-related challenges. Markets are expected to remain stable, though quality may be inconsistent over the next few weeks.



Market UPDATE

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.

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 excess heat in Mexico continues to impact yields and quality. Availability is expected to stay light, with

active market conditions continuing in the near term.

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 adequate, though volumes are gradually declining as Eastern growing regions wind down for the season. Western supplies are steady with moderate availability, though recent California weather may impact yields and quality in the coming weeks.

peppers chili



ALERT Supplies remain tight, with limited Eastern availability and continued pressure on jalapeño and serrano markets. Western supplies from Baja and Central Mexico are also constrained by weather, while Washington continues to provide steady, good-quality volume. Relief is expected as Georgia's fall crop ramps up.

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.



Market UPDATE

potatoes



Idaho russet harvest is underway, with acreage down approximately 5 to 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 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.

availability only slightly better, with overall supplies constrained and quality varying by region.

tomatoes



ALERT Markets remain generally firm across all varieties due to ongoing regional supply constraints. Grape and cherry tomatoes are the most challenged, with East Coast production winding down because of weather-related issues, heat stress, and seasonal transitions, while availability from Baja and Central Mexico remains limited. Cherry tomato pricing has begun to rise and is expected to stay elevated until new East Coast harvests improve supply around mid-October. Roma tomatoes also remain tight, with limited Eastern production and weather-related volume reductions in Mexico, though California continues to provide steady supplies with good quality. Round tomato availability has improved modestly as Virginia's fall crop ramps up, supported by consistent California production, helping keep overall supplies balanced but not abundant. Market conditions across all tomato categories are expected to remain firm in the near term, with broader relief anticipated as Florida and other new production regions come online later this fall.

squash



ALERT Supplies remain tight, with limited Eastern availability despite new Michigan production and light volume from other regional growing areas. Georgia is beginning to add supply, with volumes expected to increase, while Florida is slated to start in mid- to late October. In the West, yellow squash remains extremely limited and zucchini





Market UPDATE

in the news...

Researchers are sending grape seeds to space to study the genetic effects of solar radiation on plants

Adam Russell | September 17, 2026 | freshfruitportal.com

Researchers from Texas A&M AgriLife are sending hundreds of grape seeds to the International Space Station, where they will spend approximately six months exposed to cosmic radiation before returning to Earth for planting and study.

The project could produce what researchers believe to be the first wine made from grapes grown from seeds that traveled through space.

The experiment is part of the Texas A&M/Aegis Aerospace Multi-Use Space Platform Integrating Research and Innovative Technology, TAMU-SPIRIT, research mission. TAMU-SPIRIT-1 is a first-of-its-kind orbital research platform planned for deployment aboard the International Space Station, designed to serve as a “satellite campus in space” and support a wide range of research and technology projects.

The project began when two senior students, Coby Arnold and Arvind Subramanyam, in the Texas A&M Department of Aerospace Engineering approached Justin Scheiner, an AgriLife Extension viticulture specialist and associate professor at the university's Department of Horticultural Sciences.

With Scheiner's guidance on grape seed biology, the students designed a carrier to take grape seeds into orbit, where extended exposure to space radiation could induce genetic

mutations.

Without the protection and shielding from the carrier, Scheiner said, the radiation exposure would likely leave the seeds non-viable.

Grape seeds: From orbit to the vineyard

After returning to Earth, the seeds will be planted alongside identical control seeds at the AgriLife Research vineyard at the institution's Thomas Ranch. Scientists will study differences in plant growth, vine and wine grape performance, and genetics.

One of three varieties going to space is Iomanto, a Texas cultivar developed by horticulturist and pioneering viticulturist T.V. Munson in the early 1900s. Scheiner said the mission represents a “full circle” moment for a native Texas vine that once helped save the global wine industry and now may contribute to the future of horticultural science.

“The research will help us understand how different levels of radiation impact the seeds and their varietal genetic expression once we grow them, but there is also the novelty that in several years we will potentially be bottling wine from seeds that left Earth,” he said.

Studying mutations, plant resilience, and genetics

Scheiner said the select grape varieties

were chosen because they already possess traits and native genetic characteristics valuable to Texas vineyards, like disease resistance and adaptations to soils and water conditions.

Although the academic and his team aren't engineering rockets, they are focused on “engineering” more resilient, adaptive, and productive plants. This knowledge could benefit both future space missions and crop production on Earth.

Mutations have shaped horticulture and wine production throughout history. Pinot gris, for instance, originated from a single, random mutation in pinot noir wine grapes.

To understand what exposure to space radiation does to the seeds at the molecular level, Scheiner partnered with additional experts in the Department of Horticultural Sciences. The team will analyze the plants for specific radiation-induced mutations after the seeds return from orbit.

“These grape varieties are tried-and-true for Texas,” Scheiner said. “From a research standpoint, we want to see how being in space might influence these varieties. For the wine geek in me, it would be very interesting if these seeds show some random positive mutation has occurred that represents the single point of origin...”

[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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