

Market OUTLOOK

Week 40: September 28-October 4, 2026



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Market ALERT

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

transportation

Nat'l Diesel Avg: \$6.529↑

Last Year: \$3.749↓

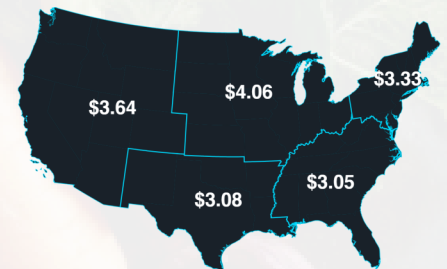
Nat'l Fuel Surcharge: \$0.95

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: Sunny skies with some clouds with highs in the 70s and lows in the 60s.

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

Yuma, AZ: Sunny skies with highs in the upper 80s, 90s and 100s and lows in the 60s and 70s.

Immokalee, FL: Thunderstorms all week with overnight weekend storms with highs in the 80s and 90s and lows in the 60s and 70s.

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 60s and 70s and lows in the 30s and 40s.



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Market UPDATE

apples



The Washington harvest is progressing well, with strong quality and color development despite a crop slightly smaller than last season. Gala and Honeycrisp harvests are underway, and demand has remained strong as retailers transition to new -crop fruit. National apple production is projected to be lower year over year. School demand remains strong, while old-crop inventories continue to decline. New-crop apples are reported to have excellent quality, sizing, and appearance.

asparagus



ALERT Production challenges in Peru tied to ongoing El Niño impacts, along with lower yields in Mexico, continue to limit supply. U.S. availability remains heavily dependent on imports, with jumbo and large sizes especially tight while standard and small sizes are more available. Demand remains steady despite elevated pricing, preventing meaningful market relief. Quality is generally fair to good, though buyers should monitor for open tips, seeding, feathering, and sizing inconsistencies. Additional Peruvian volume is expected in early October, but improvements should be gradual, keeping markets elevated through at least mid-October.

avocados



The market is entering a favorable supply period as Mexico transitions into its primary harvest season. Mexican volumes continue to increase and are expected to become the dominant U.S. supply source in the coming weeks. California and Peru remain in the market with declining production. Size profiles continue to favor 48-count fruit, while 60s and smaller remain somewhat tight. Quality is strong across most origins, and growing supplies are meeting

demand comfortably. Market conditions should remain balanced through October, supporting promotional opportunities.

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: The market is entering a period of tightening supply as weather disruptions and seasonal production transitions affect key growing regions nationwide. As the industry enters its typical October shift toward Southern production, short-term supply adjustments are expected. Recent excessive rainfall in parts of the Midwest and Northeast has further pressured the market by limiting field access, delaying harvests, and disrupting transportation. While availability may be constrained in the coming weeks, the shipper's diversified growing regions and supply network should help support consistent harvesting and production as conditions allow. Market conditions are expected to remain firm as supplies tighten heading into the fall season.

berries



Blackberries: **ALERT** Supplies remain light as ongoing rain in Central Mexico continues to limit harvests and field access. Availability is slowly improving but is expected to remain limited until mid-October when Mexico reaches full production. Quality remains steady, with Oxnard volumes increasing and additional Mexican production expected to gradually improve supply.

Blueberries: **ALERT** Supplies continue to tighten as the domestic season winds down, leaving Peru as the primary source. Import arrivals remain



Market UPDATE

berries cont...



limited, and demand continues to exceed available volumes. Quality remains good, with increasing Mexican production and upcoming Chilean arrivals expected to provide support in the months ahead.

Raspberries: Supplies have improved as fall production gains momentum, with volumes expected to continue increasing over the next several weeks. Quality remains good, while growing production in Central Mexico is helping offset declining Watsonville volume. Supplies should remain somewhat limited until Mexico reaches peak production in mid-October.

Strawberries: Salinas and Watsonville continue to provide strong volumes, with quality steadily improving. Oxnard and Santa Maria are contributing consistent supplies, and overall availability remains strong with promotable volumes expected through the seasonal transition. Cooler overnight temperatures should continue supporting quality despite warmer weather later this week.

broccoli



Broccoli: **ALERT** Supplies are limited as demand continues to increase. Quality is reported as fair, with lower yields and ongoing pin rot and insect pressure concerns. Availability is expected to remain challenged over the next several weeks.

Broccolini: **ALERT** Supplies are extremely limited due to weather-related challenges. Quality is reported as fair, and availability is expected to remain constrained over the next several weeks.

brussels sprouts



ALERT Supplies remain limited and are expected to stay light over the next several weeks.

cabbages



ALERT Supplies remain limited with reduced yields and fair quality. Insect pressure and prior weather challenges continue to impact production, and availability is expected to remain tight in the coming weeks.

carrots



Supplies are abundant, quality is excellent, and sizing has returned to normal. Strong availability is expected to continue.

cauliflower



ALERT Supplies remain limited as demand increases and insect pressure continues to impact quality and yields. Availability is expected to stay tight over the next several weeks.

celery



Supplies remain steady with good demand and fair quality. Availability is expected to remain stable, though insect pressure could contribute to higher pricing in the coming weeks.

citrus



Limes: **RADAR** The market is tightening as Mexico transitions to newer crop production. Recent rainfall and harvest disruptions have slowed movement and supported higher pricing. Colombian imports continue supplementing U.S. supplies and helping prevent more severe shortages. Quality is improving as new-crop fruit enters the market. Pricing should remain firm through early October, with availability gradually improving as harvest volumes increase.



Market UPDATE

citrus cont...



Lemons: RADAR The market remains firm as domestic supplies transition between California growing districts. Premium domestic fruit is limited, particularly on key retail sizes, while imports from Argentina and Chile continue to supplement availability. Demand remains strong, supported by retail and foodservice movement. Quality is generally good, though excessive summer heat has reduced yields in some areas. Some relief may develop as desert production ramps up in October, but markets are expected to remain stronger than typical seasonal levels.

Oranges: ALERT California Valencia oranges continue to dominate the market, with production heavily skewed toward larger sizes. Small fruit remains extremely limited, driving substitution activity throughout the supply chain. Quality varies by district, with some sizing and maturity concerns, but overall consumer acceptance remains good. Small-fruit markets are expected to stay elevated into October until new-crop transitions improve size distribution. Buyers requiring smaller oranges should anticipate continued supply constraints.

cucumbers



Supplies remain strong, supported by broad Eastern production and new fall crops in North Carolina and Georgia. Quality is good overall, with Florida expected to begin harvesting in late October. Western supplies continue to be led by Baja, with support from Central Mexico and northern Sonora. Barring weather disruptions, a smooth transition into Mainland Mexico is expected with favorable supply conditions.

eggplant



RADAR Supplies remain light to moderate but

adequate to meet demand. Eastern production is transitioning from regional programs to newer crops in Georgia and eastern North Carolina ahead of Florida's fall season. Western supplies are also light but sufficient, supported by Fresno and Washington. Quality ranges from good to very good despite some regional variability.

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 light with fair quality and solid demand. Availability is expected to stay limited over the next several weeks, causing escalated market prices.

kale



Supplies are lighter than normal, though demand remains good. Quality is fair, and availability is expected to remain somewhat limited over the next few weeks as insect pressure persists.

lettuce



Green & Red Leaf: ALERT Supplies remain light due to weather-related challenges and increased insect pressure. Quality is fair, with some tip burn and isolated INSV present. Similar conditions are expected over the next several weeks.

Iceberg: ALERT Supplies remain very limited as demand continues to strengthen. Quality is fair,



Market UPDATE

lettuce cont...



with lighter carton weights, reduced yields, and increasing pressure from INSV, Sclerotinia, and insects. Availability is expected to remain highly constrained in the coming weeks.

Romaine: Supplies remain light with strong demand and lighter-than-normal carton weights. Quality is fair, with tip burn, INSV, Sclerotinia, and insect pressure impacting yields. Availability is expected to remain tight over the next several weeks.

Tender Leaf: Supplies remain steady, though quality is only fair due to increased insect pressure, higher temperatures, and humidity. Availability should remain stable, but quality may continue to be inconsistent in the near term.

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 limited, 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 due to heat-related yield and quality challenges in Mexico. Availability is expected to stay light for several more weeks.

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 ample, though some regional programs are winding down and quality varies by growing conditions. Eastern production is transitioning back to Georgia, with light volume expected soon and stronger seasonal availability to follow. Western supplies from Fresno and Washington are projected to gradually decline ahead of Coachella's mid-October start. Quality is fair to good despite weather-related challenges.



Market UPDATE

peppers chili



ALERT Supplies remain somewhat tight, with Eastern production centered in New Jersey, Michigan, and Ohio, while jalapeños and serranos continue to be the most limited items. Western supplies are also snug due to weather impacts in Baja and Central Mexico, though Washington continues to provide good-quality volume. Additional fall production from Georgia is expected in the coming weeks and should help improve availability.

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 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.

squash



ALERT Supplies remain mixed, with moderate zucchini availability and tighter yellow squash supplies as production shifts into fall regions. Eastern volume should improve as Georgia acreage comes online over the next 7 to 10 days, while Western supplies remain limited, especially on yellow squash. Quality ranges from fair to good, with zucchini generally stronger than yellow squash.

tomatoes



ALERT Supplies remain mixed across varieties as seasonal transitions and weather-related challenges continue to impact availability. Grape tomato supplies are adequate but somewhat limited, supported by steady Virginia production, while cherry tomatoes remain tight and prices are rising due to early East Coast production declines caused by adverse weather. Roma tomato supplies are the most constrained, with Tennessee production winding down and limited Western volume from California and Mexico creating a supply gap ahead of Florida's November season. Round tomato availability remains moderate, supported by Eastern production and good quality, though smaller sizing and delayed Florida harvests are extending the transition period. Overall, markets are expected to remain firm in the near term, with relief anticipated as new East Coast and Western plantings begin harvesting and additional Florida production comes online through mid-October and into November.



Market UPDATE

in the news...

California Declares State of Emergency Ahead of El Niño

The Packer Staff | September 21, 2026 | thepacker.com

As a historic El Niño storm season develops, California Gov. Gavin Newsom has proclaimed a state of emergency, mobilizing state resources ahead of potential winter storms and other impacts.

The state says the emerging El Niño event has already broken records, and forecasters expect it to continue to strengthen, potentially becoming the strongest in recorded history.

The governor's office says the emergency proclamation streamlines measures to help California prepare for this historic event and puts the state in a stronger position before winter weather intensifies. It directs state agencies to begin protecting vulnerable communities, prepare roads and critical infrastructure, stage emergency supplies and help local partners reduce flood, landslide and coastal risks.

In addition, Newsom also proclaimed

states of emergency to support recovery efforts for three severe weather events that previously caused significant damage in Glenn, Humboldt, Kern, Mendocino and Santa Barbara counties, as well as a major sewage spill that caused major damage in Lake County.

The governor's office says federal forecasters note that El Niño is strengthening, with a greater than 90% chance of a very strong event this fall and winter and a 75% chance it could reach historic strength. The Pacific is unusually warm, and that warmth can shift storm tracks and load the atmosphere with more energy over the months ahead.

For California, that can mean repeated rounds of heavy rain, strong winds, mountain snow, flooding, landslides, debris flows, large waves and coastal flooding, especially when storms hit during very high tides.

Among the actions ordered, the emergency proclamation directs state agencies to lead the state's flood-risk-reduction efforts, stage flood-fighting supplies — such as sandbags and pumps — and preposition other critical equipment.

"We are not waiting for this season's storms to be on our doorstep," says Caroline Thomas Jacobs, director of the California Governor's Office of Emergency Services. "Cal OES is leading California's statewide efforts by bringing state and local partners together, conducting advance planning efforts and identifying potential needs before impacts occur. By planning early and coordinating resources ahead of El Niño, we are working to ensure communities and first responders have the personnel, equipment and support they need to prepare for severe weather, respond quickly when..."

[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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