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Market Outlook

Week 43: October 19-25, 2026



Market Alert

Asparagus
Beans
Berries
Broccoli
Brussels Sprouts
Cabbage
Celery
Grapes
Lettuce
Melons
Mushrooms
Onions Green
Peppers
Squash
Tomatoes

Transportation

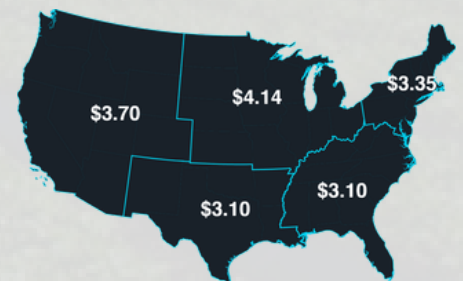
Nat'l Diesel Avg: \$6.179 ▼

Last Year: \$3.665 ▲

Nat'l Fuel Surcharge: \$0.90

Shortages: Freight market is tight

- extreme - CA, DE, MD, VA, & WA
- slight - DE, MD, VA, & TX



previous week's average outbound reefer rate for each region
Map from DAI

Weather Outlook

Oxnard, CA: Mostly sunny skies with highs in the 60s to 70s and lows in the 50s.

Salinas, CA: Partly cloudy and showers with highs in the 60s and lows in the 40s to 50s.

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

Immokalee, FL: Mostly sunny skies with highs in the 80s and lows in the 60s.

Idaho Falls, ID: Partly cloudy skies with highs in the 50s to 60s and lows in the 30's.



Market Update

apples



Washington harvest activity continues to gain momentum, with increasing volumes of Gala, Honeycrisp, and additional varieties entering the market. Quality remains excellent, with strong color, firmness, and sizing reported across the new crop. While overall production is slightly smaller than last season, supplies are expected to remain sufficient to support retail and foodservice demand. New-crop transitions are progressing smoothly, and market conditions are anticipated to remain stable as harvest volumes continue to build through October.

asparagus



RADAR Supplies should remain relatively steady, though market dynamics differ between Mexico and Peru. USDA expects Mexican crossings through Arizona, California, and Texas to remain stable, with slower trading and limited spot activity due to supplies being concentrated among fewer shippers. Peru is also expected to maintain steady movement through South Florida. With both origins showing stable supply, the market is expected to remain balanced near term rather than tighten.

avocados



Supplies remain strong. Mexican movement through Texas is expected to stay steady, while the Hass Avocado Board projects more than 60 million pounds over the next two weeks. This should keep supply-demand pressure manageable and the market well supplied.

bananas



Supplies remain stable with steady production, reliable shipping schedules, and strong quality. Supply and demand are well balanced, keeping the overall market conditions and pricing favorable.

beans



ALERT October marks a seasonal transition as production shifts to southern growing regions,

creating tighter supply conditions during the changeover. Heat and variable weather across the Midwest, combined with recent storm activity in the Northeast, have impacted production, harvest schedules, and transportation. Supplies are expected to remain constrained through October as southern production ramps up and the market works through the transition. While conditions are expected to gradually improve, elevated pricing and firm market conditions are likely to persist until supplies stabilize.

berries



Blackberries: ALERT Supplies remain tight following hurricane-related disruptions in Mexico. Wet field conditions continue to impact harvests and pack-outs, though new growing regions coming online should gradually improve availability over the next few weeks.

Blueberries: ALERT Supplies remain tight as the domestic season has ended and the market relies on imports. We are entering the shortest supply window of the import season, with limited availability expected through early November. Peru continues shipping fruit, but ongoing heat is reducing berry size and yields. Production in Mexico has also slowed following recent tropical storms.

Raspberries: ALERT Supplies remain steady overall. Recent hurricane-related rainfall is expected to slow harvests temporarily, but impacts should be short-lived due to protected growing conditions. Availability is expected to improve gradually week over week.

Strawberries: ALERT Supplies are beginning to tighten in Salinas and Santa Maria as recent heat has reduced production and pushed more underperforming fields into processing. Central Mexico has started shipping this week, but meaningful volume will take several weeks to develop. Early Mexican fruit is sizing smaller than domestic product. Florida fields are planted and will be the next major domestic growing region.



Market Update

broccoli



Broccoli: **ALERT** Supplies remain light, with demand continuing to exceed availability. Diamondback moth pressure is impacting yields and quality in Salinas and Santa Maria, keeping markets elevated. Cooler temperatures should help slow insect activity, but supplies are expected to remain limited for the next several weeks.

Broccolini: **EXTREME** Supplies remain extremely limited as insect pressure continues to reduce yields and impact quality. Demand remains strong and markets are elevated. Cooler temperatures may help ease pressure, but availability is expected to remain challenged for the next few weeks.

brussels sprouts



ALERT Supplies remain inconsistent, with fair quality and ongoing insect pressure. Availability is expected to stay limited over the next few weeks. Market conditions should remain volatile through October.

cabbages



ALERT Supplies remain limited as insect pressure continues to impact yields and quality. Diamondback moth activity remains a concern, with larvae causing damage within cabbage heads. Demand remains elevated, and supply and quality challenges are expected to continue for several more weeks.

carrots



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

cauliflower



Supplies have improved this week and demand remains elevated. Production continues from Salinas and Santa Maria, with supplies expected to remain adequate next week. Seasonal transitions are approaching and could create challenges, while forecasted showers in Salinas may affect production.

celery



ALERT Supplies are lighter this week, while demand remains elevated. Quality is reported as only fair and yields continue to decline. Weather and insect pressure are expected to further reduce availability, with markets likely to strengthen over the coming weeks.

citrus



Limes: The market remains relatively stable, with both Mexico and Colombia actively supplying the U.S. terminal market. Availability is expected to remain manageable, though size-specific pricing may continue to be uneven.

Lemons: California lemons remain available, though supplies are fairly light. The longer-term outlook is more favorable, with California's 2026/27 lemon crop forecast at 28.0 million boxes compared to 26.0 million in 2025/26. Near-term availability may remain somewhat tight, but the larger crop forecast is a positive signal as the season progresses.

Oranges: California oranges are moving through a seasonal transition with light supplies and good demand. The 2026/27 California all-orange crop is forecast at 50.5 million boxes, up from 49.5 million in 2025/26. Supply conditions are expected to improve as the California Navel season gains momentum.

cucumbers



Supplies remain adequate overall, with strong Eastern production offsetting lighter availability in the West. Georgia and North Carolina continue to provide good volume and quality, while Baja and Sonora remain limited but are expected to improve as weather stabilizes. Additional volume from Florida and western regions is expected later this month.

eggplant



Supplies remain steady with good quality across Eastern and Western growing regions. NC and GA continue to provide adequate volume as northern areas wind down, while CA production remains stable. Mexican volume is beginning to increase and should support availability over the next few weeks.



Market Update

grapes



ALERT Supplies remain tight as the California season winds down and growers transition to shipping fruit from storage. Limited availability continues to support elevated market pricing, and current conditions are expected to persist into mid-November. While quality remains generally acceptable, overall supplies are constrained, creating a firm market environment. Where operationally feasible, transitioning to alternative varieties may help alleviate supply challenges during this period.

herbs



Markets remain generally stable, particularly in the West. Cilantro, basil, dill, mint, oregano, rosemary, and several other herbs are steady. Barring weather or transportation disruptions, availability should remain consistent in the near term, though cilantro and parsley remain sensitive to regional supply shifts.

kale



Supplies remain near expected levels with good overall quality. Demand is steady, though availability is expected to remain somewhat limited. Insect pressure continues to be a concern, but markets are expected to remain stable.

lettuce



Green & Red Leaf: ALERT Supplies remain extremely limited due to INSV and increasing insect pressure. Quality is only fair, with cosmetic defects becoming more visible several days after harvest. Plant stress continues to impact yields, and supply and quality challenges are expected until the transition to Yuma in mid-November.

Iceberg: ALERT Supplies remain extremely short as demand stays elevated. Lighter weights and smaller heads are expected over the next few weeks. INSV, Sclerotinia, and insect pressure continue to impact quality and yields, with some acreage being bypassed due to field losses. Growers expect the greatest supply and quality challenges over the next two weeks.

Romaine: ALERT Supplies remain extremely light and carton weights are running below normal. Growers continue to report both internal and external quality issues caused by INSV, Sclerotinia, and insect pressure. Reduced yields and elevated demand are expected to keep supplies tight and markets elevated in the coming weeks.

Tender Leaf: Supplies are generally meeting demand, but quality remains only fair. Increased insect pressure, higher humidity, and mildew damage are creating inconsistent quality. Availability and pricing are expected to remain relatively stable, though quality challenges will likely persist for the next few weeks.

melons



RADAR The California season is wrapping up, with harvest expected to end this week. Late-season sizing is trending smaller, though quality remains good. Yuma has started with light volume and should ramp up next week, but overall supplies are expected to remain limited over the next month as the market transitions to offshore production. Weather remains the primary risk, with tropical activity potentially impacting Yuma and Mexico. Offshore, Guatemalan production is progressing well, with first arrivals into Florida expected around the second week of November.

mushrooms



ALERT Supplies of white and brown mushrooms remain light as demand has increased in recent weeks. The current quality is reported as fair, and growers continue to face labor shortages during harvest. Availability is expected to remain limited, with markets staying elevated over the next several weeks.

onions



Harvest is wrapping up, with supplies transitioning into storage and market pricing easing from recent highs. However, super colossal and colossal onions



Market Update

onions cont...



are expected to remain tighter than normal due to extreme heat, wildfire smoke, and other growing challenges that impacted sizing and reduced yields. Rising costs for seed, fertilizer, labor, and transportation continue to add pressure throughout the supply chain. While pricing has softened in the short term, market levels are expected to strengthen ahead of the holiday demand period, particularly on jumbo and larger-sized onions where availability remains limited.

onions green



ALERT Supplies remain very limited, with Mexico serving as the primary source. Excessive heat has created yield and quality challenges, and availability is expected to remain light for several more weeks. Markets are expected to stay elevated.

pears



Washington availability is expected to improve steadily 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



RADAR Supplies are tightening in the East as northern and regional programs wind down and production shifts to Georgia, where harvests are just beginning. Western supplies remain relatively steady with moderate volumes and good quality, but delays in Mexican production may keep availability snug through the transition. Quality is average to good, with markets expected to remain stable to slightly firm.

peppers chili



ALERT Supplies remain tight as northern production

winds down and growing regions transition to Georgia and Mexico. Jalapeños, Cubanelles, poblanos, and tomatillos remain the most limited items, with constrained availability expected until southern and Mexican production increases.

pineapples



Supplies remain tight as Costa Rican volumes continue to run below historical levels due to the lingering effects of earlier weather-related challenges. Growing conditions remain a concern, and similar patterns could impact production moving into 2027 if conditions do not improve. Strong demand from industrial and juice processors continues to divert fruit, including smaller sizes, away from fresh and IQF channels, further limiting availability. Supplemental volume from Ecuador, Panama, Guatemala, Honduras, and Mexico is helping offset some of the shortfall; however, these regions do not yet have the capacity to fully replace reduced Costa Rican production. As a result, supplies are expected to remain constrained and market conditions firm in the near term.

potatoes



Harvest is currently wrapping up, with acreage estimated to be down approximately 5-8% from last year, resulting in one of the smaller crops in recent years. Early harvest results indicate strong quality, favorable sizing, and solid yields; however, growing season challenges, including limited water availability, above-normal temperatures, dry conditions, localized hail, and thrip pressure, continue to warrant close monitoring. Availability of larger-sizes remains tighter than normal, and prices have increased on larger counts due to limited supply. Overall, the market is expected to be more balanced than last season, supporting firmer pricing and stronger market fundamentals, particularly for larger-sizes. Prices may see additional upward pressure as demand builds heading into the holiday season.



Market Update

squash



ALERT Supplies remain mixed as production transitions to southern growing regions. Yellow squash remains tighter than zucchini, especially in the East, while Western production shifts from California to Sonora. Quality is generally fair to good, and availability is expected to gradually improve as production increases in Georgia, Florida, and Mexico.

tomatoes



ALERT Supplies remain tight across all varieties. Grape and Roma tomatoes are especially limited as Eastern and Western production transitions between seasons, while round tomato availability remains below demand as California winds down and Florida ramps up for fall. Cherry tomato markets are also strengthening due to weather-related production challenges and reduced East Coast supplies. Mexican imports continue to provide some support, but overall availability remains constrained and markets are expected to stay firm until new crop production improves later this fall.





Market Update

In The News...

PRO*ACT Crop Update: Eyes on Yuma

By **Joey Piedimonte** | October 14, 2026 | *TheProduceNews.com*

We've spent the last several weeks talking about the end of the Salinas season, and now we're right in the middle of the toughest part of transition. Iceberg and Romaine volumes are expected to be at some of their lowest levels over the next few weeks. Virus and soil-borne disease pressure have been intense enough that some Salinas growers have already finished portions of their season ahead of schedule rather than continue harvesting fields with declining quality and poor usable yields.

That leaves fewer good acres to carry us through the finish, while weights and sizing remain inconsistent and overall availability stays tight.

Huron is starting to ramp up and will provide some much-needed relief on Iceberg and leaf lettuces, but we're not out of the woods yet. Huron is a short bridge, and all eyes remain on Yuma as we work toward the main desert transition in November.

Yuma received some help from Mother Nature over the weekend as the remnants of Hurricane Rachel moved through the Desert Southwest. The rainfall amounted to some welcome free irrigation for newly planted acreage, although the system also brought gusty winds that growers will be evaluating for any damage to young plants.

At this point in the season, the desert crop becomes increasingly important. We know where Salinas is headed, Huron can only carry so much of the load, and the next few weeks are really about getting from one growing area to the next.

Tomatoes are going through a transition of their own. Supplies are tightening as regional deals wind down and the next growing areas are still getting started. That combination is pushing markets higher across rounds, Romas, grape and cherry tomatoes.

On the East Coast, several summer growing areas are finishing, while Georgia and Florida are still building volume. Florida will be especially important over the next few weeks, but early production is expected to be light. Out West, California production is tapering off while Mexico remains relatively tight. Baja came through Hurricane Polo better than initially feared, but recent rain in Mexico continues to create some variability in yields and quality.

Across the board, there just isn't a lot of extra tomato volume sitting around right now. Customers may notice more variation in color, firmness and shelf life as product moves between growing regions. Large rounds are becoming harder to find, and grape and cherry tomatoes are especially tight. This is one of those periods where buying what you need, keeping inventories moving and staying flexible on size will matter more than trying to build too much safety stock.

The tomato market should improve as Florida and Mexico build volume, but that takes time. Elevated markets could stick with us through Thanksgiving depending on how quickly those regions come online and what Mother Nature throws at them between now and then.

[Read full article HERE](#)

Market Update

Salinas - Leaf Transition Schedules - Fall 2026					Smaller Transitions before moving to Yuma Az.
Grower / Shipper	Current Location	Transitioning	Commodity	Transition Dates	
Bengard Ranches	Salinas, CA	Yuma, Az	Broccoli Crowns	Nov 13-16, 2026	
Bengard Ranches	Salinas, CA	Yuma, Az	Cauliflower	Nov 13-16, 2026	
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Iceberg	Nov 13-16, 2026	Huron, Ca. - 10/16/26
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	Nov 13-16, 2026	Oxnard, Ca. - 10/12/26
Bengard Ranches	Salinas, CA	Yuma, Az	Lettuce Romaine	Nov 13-16, 2026	Oxnard, Ca. - 10/07/26
Bengard Ranches	Salinas, CA	Oxnard, Ca	Celery	Dec 1-4, 2026	Oxnard, Ca. - 12/01 - 06/15/27
Church Brothers	Salinas, CA	Yuma, Az	Broccoli Crowns	Nov 23, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Cauliflower	Nov 23, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Iceberg	Nov 19, 2026	Huron, Ca. - 10/16/26
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	Nov 16, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Lettuce Romaine	Nov 02, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Celery	Nov 16, 2026	
Church Brothers	Salinas, CA	Yuma, Az	Value Added / Processing Plant	Nov 16, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Broccoli Crowns	Nov 09, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Iceberg	Nov 09, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	Nov 09, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Lettuce Romaine	Nov 09, 2026	
Field Fresh Farms	Watsonville, CA	Yuma, Az	Value Added / Processing Plant	Nov 09, 2026	
Green Gate Fresh	Salinas, CA	Yuma, Az	Value Added / Processing Plant	Nov 09, 2026	
River Fresh Farms	Salinas, CA	Yuma, Az	Broccoli Crowns	Nov 23, 2026	
River Fresh Farms	Salinas, CA	Yuma, Az	Cauliflower	Dec 02, 2026	
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Iceberg	Nov 09, 2026	Huron, Ca. - 10/16 - 11/13/26
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Green Leaf / Red Leaf	Nov 16, 2026	Oxnard, Ca. - 10/07 - 11/13/26
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Romaine	Nov 09, 2026	Oxnard, Ca. - 10/07 - 11/13/26
River Fresh Farms	Salinas, CA	Yuma, Az	Lettuce Romaine Hearts	Nov 09, 2026	Huron, Ca. - 10/22 - 11/13/26
River Fresh Farms	Salinas, CA	Oxnard, Ca	Celery	Nov 30, 2026	Oxnard, Ca. - 11/30 - 06/04/27
River Fresh Farms	Salinas, CA	Yuma, Az	Tender Leaf/Value Added	Nov 16, 2026	
Taylor Farms - CA	Salinas, CA	Yuma, Az	Value Added / Processing Plant	Nov 16, 2026	
*** Dates are tentative and are subject to change ***					

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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