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Market Outlook

Week 42: October 12-18, 2026



Market Alert

Asparagus
Beans
Bell Peppers
Berries
Broccoli
Brussels Sprouts
Cabbage
Cauliflower
Chili Peppers
Cilantro
Grapes
Lettuce
Melons
Mushrooms
Onions Green
Oranges
Squash
Tomatoes

Transportation

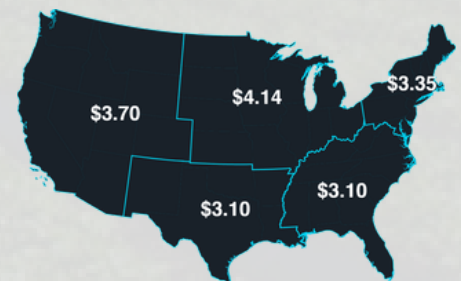
Nat'l Diesel Avg: \$6.199 ▼

Last Year: \$3.711 ▲

Nat'l Fuel Surcharge: \$0.90

Shortages: Freight market is tight

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



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

Weather Outlook

Oxnard, CA: Shower and sunny skies with highs in the 60s to 80s and lows in the 50s to 60s.

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

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

Immokalee, FL: Sunny and thunderstorms with highs in the upper 80s and lows in the upper 60s.

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 50s 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



ALERT The market remains firm, with U.S. supply heavily dependent on Peru and Mexico. Larger sizes continue to be the most difficult to source, while standard and smaller sizes are more available. Supply improvements have been gradual, and overall availability remains below desired levels. Quality is generally fair to good, though open tips, feathering, and size variability should be monitored. Elevated pricing is expected to persist through mid-October.

avocados



Supply conditions are improving as Mexico's harvest continues to build, helping offset lower production from California and Peru. Availability is expected to support normal foodservice and retail demand, with strong supplies of larger sizes. Smaller fruit remains somewhat tighter, but overall market conditions are balanced. Quality is strong, creating favorable opportunities for promotions and stable procurement programs through October.

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 mixed, with steady availability and good quality from Oxnard, while Watsonville volumes remain limited but are producing quality fruit. Weather conditions in Mexico continue to be a factor to watch, as warmer temperatures and rain could impact availability and quality. Once conditions improve, production from Central Mexico is expected to increase, supporting better overall supplies.

Blueberries: ALERT Supplies remain heavily dependent on imports as the domestic season winds down, with availability expected to stay tight through early November. Conventional volumes are limited, though recent arrivals have improved modestly and are expected to increase gradually. Quality from Central Mexico remains good, but temperature fluctuations across key growing regions may impact sizing, availability, and overall supply through October. Market conditions are expected to remain firm until additional volume becomes available.

Raspberries: Supplies are transitioning as Watsonville production gradually declines, though quality remains good. Availability is improving with increased production from Central Mexico, which is supporting additional volume and promotional opportunities. However, rainfall and fluctuating temperatures in Mexico could impact harvest schedules, create occasional supply gaps, and lead to quality concerns as the season progresses. Overall availability is



Market Update

berries cont...



expected to improve, but weather will remain a key factor to watch.

Strawberries: **ALERT** Supplies will be challenged as high temperatures across California impacts production and quality. In Oxnard, daytime temperatures in the upper 90s and warm overnight conditions are contributing to reports of soft and overripe fruit, with growers working aggressively to harvest ahead of peak heat to maintain quality. The Watsonville/Salinas region continues to remove underperforming fields and divert fruit to processors, further reducing fresh-market availability. Growers are now anticipating supply challenges with limited availability through the month of November.

broccoli



Broccoli: **ALERT** Supplies remain limited and are increasing over the past several weeks. Quality is reported as fair, and pricing remains very active. Quality challenges and elevated insect pressure, particularly from Diamondback moths, continue to be reported. Warm weather has supported increased moth activity, with larvae often burrowing into broccoli crowns and becoming difficult to detect during harvest. As a best practice, broccoli should be thoroughly washed and inspected before use. Cooler temperatures are expected to reduce larvae populations and slow pest development. With yields remaining below normal, supplies are expected to stay limited over the next few weeks, supporting elevated pricing.

Brocolini: **EXTREME** Supplies remain extremely limited as demand continues to increase. Availability and yields are being impacted by prior weather-related challenges and insect pressure, resulting in ongoing supply constraints. Quality is fair, while market pricing remains at elevated levels due to tight availability. Supplies are expected to remain challenged over the next several weeks, with fair quality and continued pricing pressure anticipated

brussels sprouts



ALERT Supplies remain inconsistent, with quality reported as only fair due to ongoing insect pressure and related growing challenges. Availability is expected to remain near demand levels over the next several weeks, though supply fluctuations may continue. Market conditions are expected to remain variable, resulting in inconsistent pricing through October. Expect periodic availability challenges and quality concerns as the market works through current production pressures.

cabbages



EXTREME Supplies will remain very limited as yields continue to be impacted by insect pressure, particularly Diamondback moth activity. Warm weather has contributed to increased pest pressure, creating additional challenges for both quality and harvest efficiency. Product from Central California is currently reporting only fair quality, while demand remains strong and market pricing continues to be active. Supply and quality challenges are expected to persist until the seasonal transition to Yuma, in early November. Limited availability and elevated market conditions are anticipated to continue over the next several weeks.

carrots



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

cauliflower



ALERT Supplies remain light as demand continues to outpace availability. Production from Salinas and Santa Maria is being impacted by reduced yields and increased insect pressure, particularly Diamondback moth, resulting in only fair overall quality. Warm weather has contributed to elevated pest activity, creating additional quality concerns and supporting higher market pricing. Supplies are expected to remain limited over the next several weeks, with



Market Update

cauliflower cont...



continued quality challenges, reduced yields, and elevated market conditions.

celery



Supplies are slightly lighter as demand remains elevated. Products from Salinas and Santa Maria, is showing fair overall quality, with yields beginning to decline. Market pricing is starting to trend higher due to tightening availability, weather-related pressures, and increasing insect activity. Supplies are expected to decrease week over week, with continued quality concerns and further pricing escalation anticipated as growing conditions remain challenging.

citrus



Limes: Supplies remain generally adequate, supported by production in Mexico and supplemental imports. Some size and quality variability persists due to recent weather conditions, with smaller sizes remaining the tightest category while larger fruit is more readily available. Additional imports continue to support availability and provide market flexibility. Overall conditions are expected to remain stable through mid-October, with only modest price movement anticipated.

Lemons: Supplies remain adequate, with strong overall quality and stable availability. Larger sizes are more readily available, while smaller counts remain somewhat tight due to steady foodservice and retail demand. Market conditions are expected to remain balanced, with no significant supply disruptions anticipated through October.

Oranges: **RADAR** Supplies remain sufficient to meet normal demand levels. Quality remains favorable with solid internal and external characteristics. Demand has strengthened with schools in session and seasonal citrus movement increasing. Size profiles continue to favor larger fruits while smaller sizes remain somewhat less available. Overall market conditions are expected to remain stable with no major supply concerns for the week ahead.

cucumbers



Supplies remain generally steady, with strong Eastern production helping offset tighter conditions in the West. North Carolina and Georgia continue to provide good volume and quality, while supplies from Baja and Sonora remain somewhat limited due to seasonal transitions and lingering weather impacts. Overall availability is adequate to meet demand, and quality, sizing, and yields are expected to improve as newer plantings come into production. Market conditions are expected to remain stable in the near term.

eggplant



Supplies remain adequate across both Eastern and Western growing regions, with steady production and generally good quality supporting current demand. While some domestic programs in northern and western regions are beginning to wind down seasonally, overall availability remains sufficient. Additional volume from Nogales is expected to help support supplies as seasonal transitions progress, keeping market conditions stable in the near term.

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 grape varieties may help alleviate supply challenges during this period.

herbs



Most varieties remain in balanced supply with good quality and stable availability. Production from California and Mexico continues to support steady market conditions across basil, parsley,



Market Update

herbs cont...



rosemary, oregano, thyme, mint, and specialty herbs.

Cilantro: ALERT Supplies will remain light as demand continues to exceed available volume. Quality is reported as only fair due to ongoing production challenges, while product continues to ship from Oxnard and Salinas. Tight availability is keeping market conditions elevated, with pricing expected to remain under upward pressure in the coming weeks. Current supply constraints are expected to persist, resulting in limited availability and elevated market levels through the near term.

kale



Supplies are lighter as demand remains strong. Product from Central California is reporting fair overall quality, with increased insect pressure continuing to impact growing conditions. Availability is expected to remain limited over the next several weeks, though market pricing is currently holding steady. Ongoing pest pressure is expected to persist in the near term, keeping quality conditions mixed and supplies somewhat constrained.

lettuce



Green & Red Leaf: EXTREME Supplies will remain very light as quality continues to be impacted by INSV and increased insect pressure. Cosmetic defects are becoming more apparent several days after harvest, further limiting overall quality, which is currently reported as only fair. Elevated demand and ongoing production challenges have pushed market pricing to extreme levels. Continued weather and pest pressures are creating significant plant stress, and both quality and market challenges are expected to persist until the transition to Yuma in mid-November.

Iceberg: EXTREME Supplies remain extremely limited as demand continues to exceed available supply. Carton weights are trending below normal, with smaller head sizes expected over the next two weeks. Field quality remains below acceptable levels, as

ongoing pressure from INSV, insect activity, and Sclerotinia continues to impact yields and overall availability. Significant crop losses have been reported in some growing areas, resulting in fields being bypassed and further tightening supply. Additional demand pressure is being created by lighter field weights, requiring increased raw product usage by processors. Market conditions are expected to remain highly challenged over the next two weeks, with continued supply constraints, quality concerns, and elevated pricing. Some production is expected to transition into Huron by the end of next week, which may provide limited relief as additional acreage becomes available.

Romaine: EXTREME Supplies remain very limited as demand continues to increase. Carton weights are expected to trend lighter than normal, further impacting overall availability. Growers are reporting below-average quality due to ongoing pressure from INSV, Sclerotinia, and insect activity, resulting in both external and internal quality concerns. Significant plant stress has led some field managers to bypass affected acreage, reducing harvestable yields. While harvest crews are working to minimize quality issues, certain cosmetic defects may not become visible until several days after harvest. Reduced yields and elevated demand are expected to keep supplies constrained, with market pricing anticipated to remain under significant upward pressure in the weeks ahead.

Tender Leaf: Supplies are reported to be steady, with overall quality remaining fair. Market conditions are expected to remain relatively stable over the next several weeks, supported by consistent availability and steady pricing. However, growers are reporting increased insect pressure driven by warm temperatures and elevated humidity levels. Production is shipping from Central California, and quality across baby leaf items is expected to remain inconsistent. Fair quality conditions are anticipated to continue through the coming weeks as growers manage ongoing pest-related challenges.



Market Update

melons



RADAR California cantaloupe, and honeydew harvests are expected to continue through mid-October, although virus-related pressure in late-season fields may shorten the Central California season. The Yuma season is scheduled to begin with limited volume, while recent weather conditions in Arizona continue to be evaluated. Fruit sizing has generally trended smaller due to virus pressure, cooler temperatures, and shorter daylight hours, resulting in stronger demand and premium pricing for larger sizes. Despite sizing challenges, internal quality remains strong with consistently favorable brix levels. Supplies are expected to remain adequate but may tighten during the seasonal transition as production shifts from California to Yuma.

mushrooms



ALERT Supplies of white and brown varieties remain limited as demand continues to strengthen. Quality is currently reported as fair, while seasonal production challenges and normal supply fluctuations continue to impact availability. Labor shortages at the farm level are also contributing to harvest constraints, further tightening supplies. Market conditions are expected to remain firm, with limited availability and elevated pricing anticipated 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 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



EXTREME Supplies remain very limited, with Mexico serving as the primary growing region. Excessive heat has negatively impacted yields and field-level quality, resulting in ongoing availability constraints. Market pricing has increased significantly in recent weeks as supplies struggle to meet demand. Current conditions are expected to persist, with light availability and quality challenges continuing over the next several weeks. Market pricing is anticipated to remain at elevated levels as the industry works through ongoing production pressures.

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 remain adequate to meet current demand, though availability is gradually tightening as northern growing regions wind down for the season. Georgia has begun harvesting and is helping offset declining production in other Eastern regions, with Florida expected to add volume later this month. In the West, California and Washington continue to provide steady supplies with generally strong quality, although weather-related delays may slow the start of Mexico's season. Overall market conditions remain balanced, but mixed quality in some Eastern growing areas is expected to persist during the seasonal transition.

peppers chili



ALERT Supplies remain very limited as Eastern growing regions, including Michigan, New Jersey, and North Carolina, approach the end of their seasons.



Market Update

peppers chili cont...



Availability of jalapeños and husked tomatillos is especially tight, while Western production from Washington, California, Baja, and Central Mexico continues to provide only limited volume. Although additional production from Georgia is expected to begin over the next two weeks, overall supplies are anticipated to remain constrained in the near term, supporting firm market conditions and restricted availability.

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 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-size potatoes 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-size potatoes. Prices may see additional upward pressure as demand builds heading into the holiday season.

squash



ALERT Supplies remain limited as northern growing regions wind down and production transitions to Georgia, with additional volume expected from Florida later this season. Yellow squash remains particularly tight due to ongoing growing challenges, while zucchini availability is somewhat better but still constrained. Western supplies also remain limited, with quality concerns and lighter volumes supporting firm market conditions. Gradual supply improvements are expected later in October as production increases in Sonora, but overall availability is anticipated to remain tight in the near term.

tomatoes



ALERT Tomato supplies remain constrained across all varieties as seasonal transitions, recent weather impacts, and reduced production continue to limit availability nationwide. Grape, Roma, Round, and Cherry markets are all experiencing tight supplies, with Eastern growing regions winding down and Western production from California, Baja, and Mexico remaining below normal. Quality is mixed to fair in several regions, while demand continues to support firm market conditions and elevated pricing. Although some new production is expected to come online later in October from Florida, Baja, and additional East Coast growing areas, meaningful relief is expected to be gradual, with supplies remaining limited and markets elevated over the next several weeks.



Market Update

In The News...

Winter freezes cut Florida orange forecast by 23 percent

By **Carla Espinoza Gutiérrez** | October 09, 2026 | **FreshFruitPortal.com**

This year's unpredictable weather patterns may be adding another crop to their victim list. Florida's citrus industry, still grappling with sharp production declines and disease pressures, now faces a less-than-ideal outlook, as 2025's winter freezes heavily impacted production across the Sunshine State.

According to the United States Department of Agriculture (USDA)'s first citrus crop forecast of the 2026/27 harvest season, Florida will produce 10 million boxes of oranges, 1.3 million boxes of grapefruit, and 450,000 boxes of tangerines and tangelos. Despite the bleak prospects, the sector remains hopeful and resilient as ever.

"The devastating freezes last winter were a speed bump on our road to recovery. But there are many signs that point to strong performance in the years ahead," said Florida Citrus Mutual CEO and Executive Vice President Matt Joyner in a recent update.

If realized, the projections point to a 23 percent drop in orange production. Grapefruit yields are set to decrease

by four percent, while tangerines and tangelos are expected to fall by two percent. Lemons, however, are forecast to rise by six percent.

"Growers are reporting healthier trees and improved fruit quality, and we're seeing higher production per acre. As newly planted acreage matures, we're hopeful the data will reflect the optimism we feel in the groves this season," Joyner noted.

Florida citrus growers urge federal aid

The fiscal year began on July 1, bringing \$196 million to strengthen Florida citrus, including \$160 million for the Citrus Research and Field Trial (CRAFT) Foundation to expand field trials of treatments and horticulture practices and support new plantings.

The legislature's investment also includes \$20 million to bolster the industry's infrastructure by purchasing, refurbishing, and repairing nursery and packinghouse equipment.

[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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