Market OUTLOOK

Week 36: August 31-September 6, 2026

Market ALERT

- Apples
- Asparagus
- Brussels
- Cilantro
- Citrus
- Green Onions
- Lettuce
- Mushrooms
- Peppers
- Squash
- Strawberries
- Tomatoes

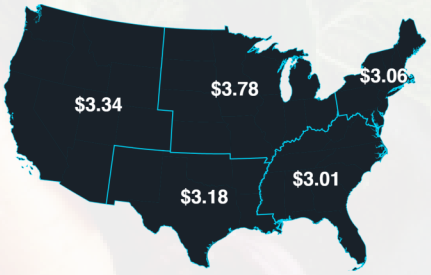
transportation

Nat'l Diesel Avg: $5.652↑
Last Year: $3.726↓
Nat'l Fuel Surcharge: $0.80
Shortages: Freight market is easing

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

National Posted Rate per mile

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



weather OUTLOOK

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

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

Yuma, AZ: Mostly sunny and some clouds skies with highs in the 105s and lows in the 80s.

Immokalee, FL: Thunderstorms with highs in the 90s and lows in the mid 70s.

Idaho Falls, ID: Partly cloudy and sunny skies with highs in the 70s and 80s and lows in the 40s and 50s.

Market UPDATE

apples

RADAR Washington storage crop inventories continue to wind down. Golden Delicious is one of the key varieties in transition, with 100-count and smaller sizes extremely tight. Most Washington packers have completed storage packs and are now shipping Ginger Golds, the first of the new-season gold varieties, followed by Gold Supreme. New crop Golden Delicious packing is expected to begin the first week of September.

asparagus

ALERT Supplies remain very tight, with the U.S. market relying heavily on Mexico and Peru as domestic production contributes little volume. Demand continues to exceed supply across all sizes, and large, extra-large, and jumbo asparagus remain especially difficult to source and may require substitutions. Standard and small sizes offer the best availability. Quality is fair to acceptable, with potential issues including open tips, seeding, feathering, dehydration, and variable sizing. Buyers should remain flexible on specifications where possible.

avocados

Supplies remain adequate, led by Mexico's harvest, while California and Peru continue to wind down. Medium and larger fruit remain more readily available, with 48-count stable and 60s and 70s seeing modest upward pricing pressure. Demand is healthy heading into Labor Day, but inventories appear sufficient to support normal needs. Quality remains good overall, though mixed origins may create variability in ripening and shelf life.

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: Demand remains strong, and volumes continue to improve weekly. Central California production is steady and should continue for the next few weeks. New crop volume from Mexico is also helping support supplies.

Blueberries: Domestic supplies continue to decline, with remaining volume coming from the Pacific Northwest. Imports from Peru are helping fill the gap. Domestic jumbo sizes are winding down quickly, but overall supplies should remain steady for the next few weeks.

Raspberries: Domestic production is past peak volume, while supplies from Mexico continue to increase. Demand is steady. Supplies will remain lighter in the near term before gradually improving, supported by favorable weather conditions.

Strawberries: **ALERT** Volumes remain limited from Watsonville and Salinas, though some fruit is now coming out of Santa Maria, with production expected to increase weekly. Supplies should improve into September. Demand has increased, temperatures have cooled, and quality is currently reported as fair.

broccoli

Broccoli: Supplies are steady, but demand has increased in recent weeks. Quality is fair, with product shipping from Salinas and Santa Maria.

Market UPDATE

broccoli cont...

Market pricing remains active due to demand and some insect pressure is being reported from warmer temperatures.

Broccolini: Supplies and yields are steady, while demand has increased. Quality is fair, and market pricing is more active. Supplies are expected to remain steady over the next few weeks.

brussels sprouts

ALERT Supplies remain light and are expected to tighten further over the next few weeks. Continued demand and reduced availability are expected to drive market pricing higher.

cabbages

Supplies are steady, though yields are slightly lighter. Quality is fair, and demand is steady. Pricing has become more active and is expected to remain firm 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 through the summer.

cauliflower

Supplies are good this week and expected to stay steady. Demand is picking up. Quality is reported as fair. Market pricing is expected to strengthen with increased demand.

celery

Supplies and demand remain steady with fair quality. Improved supplies should keep market pricing stable over the next few weeks.

citrus

Limes: Supply has moved into a more balanced position, with good availability and a steady market. Growing conditions are favoring larger sizes, improving supplies of 110s and 150s while reducing smaller sizes. Mexico remains the primary source, with Colombia providing additional support. Quality is fair to good, though rain and heat may cause oil spotting, scarring, lighter color, and variable pack-outs.

Lemons: **RADAR** The crop continues to skew toward larger fruit, while smaller foodservice sizes remain tighter. Overall volume is adequate thanks to domestic and imported supplies, but size imbalances persist. Quality is generally strong, with good juice content, though some cosmetic scarring and color variation may occur. Demand is steady, with school reopenings keeping pressure on 115s, 140s, and similar sizes.

Oranges: **ALERT** California Valencia supplies remain tight on smaller sizes, with production centered on larger 56s, 72s, and 88s. Demand is strong, and school reopening is increasing competition for limited 113s and 138s. Quality is reported as fair to good. Larger fruit remains readily available, while smaller foodservice and school-pack sizes continue to carry higher prices and greater substitution risk.

cucumbers

Eastern supplies are steady with strong production from MI and other northern regions. Western supplies are tighter due to production gaps and lighter Baja yields, though new fields should improve supplies in the next two weeks. Overall quality is good, with strong Eastern production balancing tighter Western conditions.

Market UPDATE

eggplant

Supplies are steady, with good availability across multiple growing regions. Eastern local programs, Fresno, Washington, and limited Mexican production are all contributing volume. Quality is generally good, and no significant near-term supply concerns are expected.

grapes

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

herbs

Supplies remain steady, including basil, dill, mint, oregano, rosemary, and sage, though chives, tarragon, thyme, watercress, and other specialty items are more limited. Late-summer heat continues to pressure quality and shelf life, particularly for basil, which remains vulnerable to bruising, discoloration, and decay. Parsley and hard herbs are providing the most reliable coverage. Demand is expected to remain steady through the holiday week.

Cilantro: ALERT Supplies are light, and quality is fair due to mildew pressure. Demand remains good. Product is shipping from Oxnard and Salinas, and limited availability is expected to keep pricing active in the coming weeks.

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 remain steady, with fair quality reported. Occasional tip burn is present on outer leaves. Improved availability and softer demand have eased market pricing. Supplies are expected to remain steady in the coming weeks.

Iceberg: ALERT Supplies are lighter than recent weeks, while demand has increased. Carton weights are expected to remain normal. Quality is fair, though some fields are showing signs of INSV. Reduced yields and stronger demand are expected to keep markets active.

Romaine: Supplies remain steady, but demand is increasing in western markets. Quality is fair, with occasional tip burn and some INSV present. Yields are average, and pricing is expected to strengthen due to higher demand and fluctuating yields.

Tender Leaf: Supplies remain steady, with consistent volumes reported by growers. Processors continue shipping from Central California, and quality has improved. Supplies and market pricing are expected to remain stable.

melons

Honeydew and cantaloupe markets have strengthened due to increased demand, driven by Eastern rain-related disruptions that shifted buyers west and retailer promotions ahead of Labor Day. Quality remains excellent on both items.

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.

Market UPDATE

onions

Idaho harvest continues to ramp up, with good overall quality and availability across all colors and sizes. However, super and colossal 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 light, with Mexico as the primary growing region. Excessive heat is impacting yields and quality, limiting availability. Market pricing has increased and is expected to remain active over the next few 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 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 are strong, with ample availability across Eastern and Western growing regions. Harvests in Michigan, Ohio, New Jersey, New York, Fresno, and Washington continue to support a well-supplied market with good quality. While hot weather requires ongoing monitoring, volume remains steady and availability is expected to stay reliable.

peppers chili

ALERT Supplies remain mixed by variety and region. In the East, local production from Michigan, Ohio, and neighboring areas is supporting most varieties, though serranos remain tight and habaneros are limited in some programs. In the west, California and Mexico are providing improved coverage on jalapeños, Anaheim, serrano, and tomatillos, with additional Mexican volume expected in the coming weeks. Overall quality is generally good despite localized weather-related challenges.

pineapples

Supplies remain steady with good availability and consistent quality. Overall market conditions are stable with no significant disruptions expected.

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 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 sizes.

Market UPDATE

squash

RADAR Supplies are tight across both regions due to heat, seasonal transitions, and reduced production. New crops in North Carolina and Michigan are beginning to improve eastern availability. In the west, zucchini is especially tight, while yellow squash is also moving on lighter volumes. Additional harvests should gradually improve availability in the coming weeks.

tomatoes

RADAR Supplies are somewhat tight across all categories. Grape tomatoes are limited as Eastern programs wind down and Baja volumes remain light, though September production should improve availability. Roma supplies are snug across California, Baja, Central Mexico, and South Texas, especially on larger sizes. Round are also tighter due to heat and seasonal transitions, with larger vine-ripe sizes most affected. Overall quality remains good, but availability is expected to stay constrained in the near term.

in the news...

From Inputs to Margins: The Real Cost of U.S.-Canada Trade Friction

Jennifer Strailey | August 25, 2026 | thepacker.com

With nearly $6.5 billion in cross-border fresh produce trade hanging in the balance, impending Canadian retaliatory tariffs and new U.S. duties are threatening to disrupt tightly timed North American supply chains and squeeze already razor-thin grower margins.

The tensions follow recent U.S. duties levied on roughly $20 billion of Canadian exports, prompting Ottawa to slate counter measures for Sept. 8.

“Our members’ biggest concern is uncertainty and disruption across an integrated North American supply chain,” says Samantha Ayoub, director of workforce and business policy for the International Fresh Produce Association. “Last year, Canada accounted for 48% of U.S. fresh produce exports, over $3.5 billion in produce. In total, the United States and Canada share nearly $6.5 billion in annual fresh produce trade.”

Because fresh fruits, vegetables and floral products move on strict deadlines, often crossing the border within days of harvest, Ayoub says any new tariff costs, administrative requirements or retaliatory measures create challenges for planning, pricing and procurement.

Where the Squeeze is Tightest

As to the U.S. produce categories most vulnerable to Canadian retaliatory tariffs, while fresh produce exchange between the countries is critically important, Ayoub points to lettuce, strawberries and grapes as potentially hardest hit.

“Canada is the largest export market for many U.S. fresh produce products and is one of the most important destinations for U.S. agriculture overall,” she says. “According to USDA, Canada was the second-largest export market for U.S. agricultural products, valued at approximately $28.4 billion in 2024. Of the over $3.5 billion in produce sales in 2024, lettuce ($358 million), strawberries ($331 million) and grapes ($208 million) were the highest value exported to Canada.”

Concerns over these potential ...

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