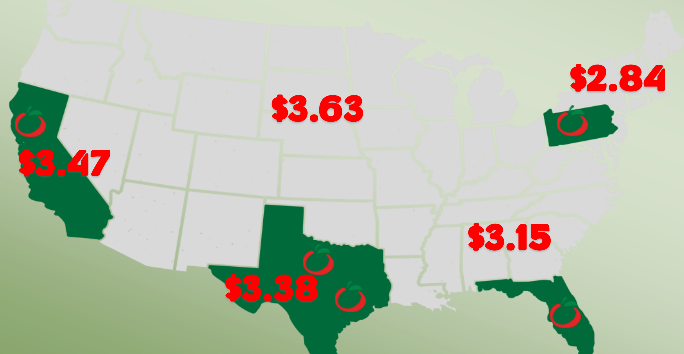
Fresh News

Market Alert

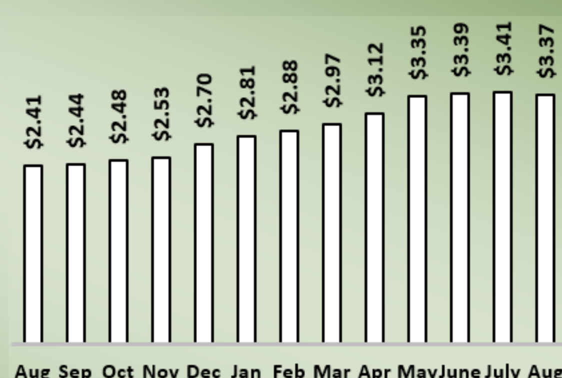
- Apples
- Asparagus
- Beans
- Blackberries
- Celery
- Citrus
- Peppers
- Potatoes

Fresh produce markets are entering the late-summer transition period with a mixed but generally manageable supply picture. California remains the primary driver for grapes, stone fruit, strawberries, lettuce, broccoli, cauliflower, celery, and a growing share of tomato volume. Pacific Northwest production is increasingly important for blueberries and apples, while Mexico continues to anchor limes, mangos, avocados, peppers, cucumbers, and a significant portion of tomato supply. The most important procurement risks are heat-related quality deterioration, size imbalances in citrus, localized berry tightness, lingering disease pressure in leafy greens, and late-summer transition volatility.

National Reefer Rate per Mile *(Last Week per DAT)*



Trend



Weather Alerts

7-DAY REGIONAL WEATHER OUTLOOK AUGUST 10 – 16, 2026	SUN AUG 10	MON AUG 11	TUE AUG 12	WED AUG 13	THU AUG 14	FRI AUG 15	SRI AUG 15	SAT AUG 16
MCALLEN TEXAS	Mostly Sunny Very Hot 104° / 78°	Sunny Very Hot 105° / 79°	Mostly Sunny Very Hot 105° / 80°	Sunny Very Hot 106° / 80°	Mostly Sunny Very Hot 105° / 80°	Sunny Very Hot 105° / 80°	Sunny Very Hot 105° / 80°	Mostly Sunny Very Hot 106° / 80°
CULIACÁN SINALOA, MEXICO	Sunny Very Hot 101° / 79°	Sunny Very Hot 102° / 79°	Very Hot Low Humidity 102° / 78°	Very Hot Low Humidity 103° / 80°	Mostly Sunny Hot 102° / 79°	Sunny Hot 102° / 79°	Sunny Hot 102° / 79°	Mostly Sunny Hot 103° / 79°
SONORA (HERMOSILLO REGION) MEXICO	Very Hot Mostly Sunny 108° / 85°	Very Hot Sunny 109° / 85°	Very Hot Sunny 109° / 84°	Very Hot Sunny 111° / 84°	Very Hot Mostly Sunny 110° / 85°	Very Hot Mostly Sunny 111° / 85°	Very Hot Mostly Sunny 111° / 85°	Very Hot Mostly Sunny 110° / 84°
FIREBAUGH CALIFORNIA	Sunny Very Hot 103° / 66°	Sunny Very Hot 104° / 66°	Sunny Very Hot 105° / 67°	Sunny Very Hot 105° / 68°	Sunny Very Hot 105° / 68°	Sunny Very Hot 104° / 68°	Sunny Very Hot 104° / 68°	Mostly Sunny Hot 104° / 67°
WATSONVILLE CALIFORNIA	AM Clouds PM Sun 69° / 54°	Partly Cloudy Mild 70° / 54°	Mostly Sunny Mild 71° / 54°	Mostly Sunny Mild 72° / 55°	Mostly Sunny Mild 73° / 55°	Mostly Sunny Mild 73° / 55°	Mostly Sunny Mild 73° / 55°	Partly Cloudy Mild 72° / 54°
TENNESSEE TENNESSEE	Scattered Thunderstorms 88° / 70°	Scattered Thunderstorms 89° / 71°	PM Thunderstorms Likely 88° / 71°	Partly Sunny Humid 90° / 70°	Scattered Showers 87° / 69°	Scattered Storms 88° / 69°	Scattered Storms 88° / 69°	Partly Sunny Hot & Humid 90° / 70°

Tomatoes

The tomato complex is better supplied than it was during the spring transition, but the market remains highly regional. Domestic production has shifted decisively toward California and northern/eastern summer districts, while Mexico continues to provide substantial Roma, round, grape, and specialty volume through Baja California and central/western production regions. The most important near-term variables are heat, hurricane/monsoon rainfall, border flow, and the balance between round and snacking-tomato demand.

Domestic Tomatoes

California – Central Valley

California is now a major summer source for mature-green and vine-ripe tomatoes. July industry reports described excellent crop potential, and August volume should be well established. Rounds are generally the most balanced item, with good sizing and quality. Roma and specialty volume is available but can vary by grower. Heat is the principal operational risk: prolonged triple-digit temperatures can accelerate color, reduce firmness, and compress the harvest window. Market tone is steady, with California supply acting as the primary stabilizing force for the national market.

Southeast / East Coast

Florida is largely out of its spring peak, while summer production has moved north through Georgia, South Carolina, Tennessee, Virginia, North Carolina, and related regional programs. Supply is more fragmented than California, which can create localized freight and quality differences. Rounds are generally adequate; Romas are lighter in some districts. Rain and humidity increase the risk of softness, cracking, and disease. Prices should remain steady with intermittent firmness when weather delays harvest. East Coast production remains important for reducing freight into eastern distribution centers.

Midwest / Greenhouse

Ohio, Michigan, Canada, and protected-culture programs provide useful summer supply for grape, cherry, cocktail, and cluster tomatoes. Greenhouse production helps moderate field-weather risk but remains sensitive to energy, labor, and pack specifications. Quality is generally strong, with consistent color and firmness. These programs can provide valuable regional freight savings and a dependable alternative when field-grown snacking tomatoes tighten. Pricing remains stable to firm depending on pack and brand.

Mexico Tomatoes

Baja California

Baja California remains a key summer source for rounds, Romas, and snacking tomatoes.

Proximity to western U.S. markets supports competitive delivered costs, and quality is generally good. Heat and water availability can influence packout, but production is expected to remain an important part of the supply base through late summer. Markets are steady, with strongest value generally available when customers can accept flexible sizing.

Sinaloa / Central-West Mexico

Sinaloa and adjacent production areas continue to contribute Roma and round tomatoes, although summer weather can reduce consistency compared with peak winter production. Rainfall and high humidity can disrupt harvest schedules and create quality pressure. Roma supply has generally been stronger than rounds at points during the summer. Buyers should watch crossings and border delays closely because a one- or two-day disruption can quickly tighten delivered inventories.

Sonora

Sonora provides supplemental tomato and pepper production but faces extreme summer heat. Irrigation, shade management, and harvest timing are critical. Heat can reduce fruit set and firmness, so quality should be monitored closely. Volume is typically less dominant than Baja or peak Sinaloa, but the region is useful for balancing western demand. Pricing is steady to firm on high-quality fruit.

Jalisco / Central Mexico

Central Mexican regions, including Jalisco, provide meaningful Roma and specialty tomato supply. Earlier summer reports described strong Roma quality and improving volume. August production should remain useful, although rainfall can affect field access and packing. The market is steady, with good opportunities for program business when growers have consistent quality.

Tomato Procurement Outlook

For the next two to four weeks, the tomato market should remain fundamentally better supplied than the spring market. California volume is the key stabilizer, while Mexico provides important continuity on Romas and snacking varieties. The principal upside price risks are extreme heat in California and Sonora, heavy rain in Mexico or the Southeast, and unexpected border or transportation delays. The recommended strategy is to keep at least two approved origins active, avoid overcommitting to a single snacking-tomato source, and use California round volume to offset regional shortages where freight economics permit.

Fruits

Apples

ALERT

Washington remains the dominant storage source as the industry approaches new-crop harvest. 2026 storage inventories entered summer below the prior year and near-to-below recent averages, which supported firm pricing through July. Early new-crop varieties are beginning to change the supply mix in August, but the broad transition will be gradual. Large fruit should remain easier to source than certain smaller foodservice sizes. Quality is generally strong on controlled-atmosphere fruit, though buyers should watch pressure, condition, and storage age closely. Market direction is steady to slightly firm until new-crop volume broadens.

Bananas

Banana supply is comparatively stable, supported by established Central American programs and predictable weekly shipping patterns. The principal risk remains logistics rather than field availability: ocean schedules, port congestion, weather in tropical production zones, and ripening-room utilization can create short-lived gaps even when overall production is adequate. Quality is expected to remain consistent if green-life management and temperature control are maintained. Pricing should be relatively stable in the near term, although fuel, ocean freight, and currency can influence delivered cost. Buyers should keep normal safety stock without materially overbuilding inventories.

Blackberries

ALERT

Blackberries remain one of the more sensitive berry items as Mexican production declines seasonally and domestic regional programs carry a greater share of demand. The July market was tighter than strawberries and blueberries, and that risk remains relevant entering August. Quality can vary by lot because heat accelerates softening, leakage, and breakdown. Supplies should be adequate for core business but less suitable for aggressive promotional volume. Buyers should favor shorter inventory turns, close inspection on arrival, and flexible sourcing among Mexico, California, and other domestic regions. Market tone is steady to firm.

Blueberries

Blueberry supply has shifted strongly toward the Pacific Northwest and other northern domestic regions after earlier California and Mexican programs declined. This seasonal transition is constructive for volume, and USDA/industry reporting has pointed to improving availability as Northwest harvests mature. Quality should be good, but heat events can affect bloom, firmness, and shelf life. Large promotional pulls may still create regional tightness. The market is expected to remain mostly steady, with opportunities to improve cost where production is peaking. Maintain flexibility on pack style and origin to capture best value.

Raspberries

Raspberry availability is moderate and more constrained than strawberries because the crop has less volume elasticity and is highly sensitive to heat. California production remains important, with Mexico supplementing portions of the market depending on program.

Quality is generally good but can deteriorate quickly when daytime temperatures rise, increasing the risk of soft fruit and shorter shelf life. Demand remains steady to strong, preventing a significant market decline. Expect a firm but orderly market, with limited promotional upside. Procurement should focus on frequent turns, cold-chain discipline, and realistic shelf-life expectations.

Strawberries

California continues to provide the majority of U.S. strawberry volume. By mid-July the market had improved from earlier weather disruptions, with stable availability and good overall quality, and that generally favorable structure is carrying into August. The principal concern is heat-related softness, bruising, smaller fruit, and reduced shelf life during warm periods. Demand remains strong but supply is sufficient for normal programs. Pricing should remain steady with intermittent firmness if heat trims yields. Buyers should reduce dwell time, monitor temperatures closely, and avoid excessive inventory during periods of elevated field heat.

Grapefruit

ALERT

Grapefruit supply is adequate, but seasonal source changes and summer citrus demand can create size-specific differences. Texas and Florida programs are not at winter peak, so buyers may see a greater dependence on storage, imports, or limited domestic availability depending on specification. Quality is generally acceptable, but color and external appearance may vary by origin. The market should remain stable to slightly firm, especially on preferred sizing. Procurement teams should confirm origin, pack configuration, and size availability before committing promotional volume and should allow flexibility where customer specifications permit.

Lemons

ALERT

Lemon markets remain elevated relative to balanced citrus categories because summer production often skews toward larger fruit while demand remains strong for smaller foodservice sizes. California district transitions and imported fruit are helping maintain supply, but 165-count and smaller fruit can carry a premium. Quality is generally good, with occasional cosmetic variation associated with warm growing conditions and long transit times. The market is expected to stay firm through the late-summer period rather than collapse. Buyers should remain flexible on size, consider import alternatives, and secure small-size commitments early.

Limes

The lime market improved from the extreme tightness seen earlier in the year as Mexican crossings increased, but sizing remains uneven. Smaller fruit is generally more available, while 175-count and larger sizes can remain comparatively tight. Rain and heat in Mexico can quickly affect packout, color, and harvest cadence, so volatility remains possible even when overall supply is adequate. Quality is mostly good, with careful attention required for stylar-end breakdown and skin condition. Expect a mostly steady market with periodic firmness on larger sizes. Substitution flexibility remains the best tool for controlling delivered cost.

Oranges

ALERT

The orange category is transitioning through the summer Valencia period as Navel supplies are effectively out of season. Valencia volume is adequate, but fruit is generally larger, which limits small-size availability for school and foodservice programs. Quality is good overall, though regreening and cosmetic variation are normal summer characteristics. Demand remains steady, and pricing should hold firm on smaller counts while larger sizes remain more readily available. Buyers should manage customer expectations on color and size and should avoid assuming winter-style Navel specifications during the Valencia season.

Grapes

California table-grape production is fully underway following the Mexico-to-California transition. July reports described new-crop quality as outstanding, and August should bring broader varietal availability across green, red, and black seedless grapes. Supply is improving, although heat can accelerate maturity and create occasional condition concerns. The market should trend steady to easier as volume builds, particularly where growers seek movement on peak varieties. Premium sizes and proprietary varieties may remain firm. This is a favorable period for promotions, provided receivers maintain strong cold-chain practices and quick turns.

Cantaloupe

Cantaloupe supply has moved beyond the severe early-summer gap caused by Arizona crop losses and delayed California production. California desert and Central Valley programs are now the key source, improving continuity and quality. The market remains sensitive because planted acreage and yield recovery are not unlimited, and heat can accelerate maturity and reduce shelf life. Sizing should be more balanced than during the June shortage, with pricing generally lower than peak levels but still capable of firming quickly. Buyers should secure promotional volume in advance and monitor brix and condition on receipt.

Honeydew

Honeydew availability has improved alongside the broader western melon transition. Domestic California supply and Mexican product together provide better coverage than during the June shortage. Quality is generally good, though brix, external color, and maturity can vary by shipper and field. Demand is steady, and the market is expected to remain stable with modest fluctuations tied to sizing and harvest timing. Buyers should continue to inspect maturity carefully and avoid overextending inventory because hot-weather melons can advance rapidly in storage. Promotional opportunities are possible when size and grade align.

Mango

Mango supply remains broadly available from Mexico and supplemental offshore sources, with the market moving through normal late-summer varietal transitions. Volume is adequate, but size profiles can shift quickly as regions finish and new districts ramp up. Quality is generally strong when fruit is handled properly, although hot weather increases the need for careful maturity and temperature management. Demand remains good at retail and foodservice. Pricing should be steady with occasional short-term firmness on preferred sizes. Buyers can use multiple origins and varieties to maintain continuity and reduce exposure to regional weather.

Pineapple

Pineapple availability improved in July after earlier tightness, with Costa Rica continuing as the primary source. Industry reports expected several weeks of stronger supply before a potential tightening later in the summer, so August should be watched closely for reduced packout or size imbalance. Quality remains good overall, but larger fruit may be more available than certain high-demand counts depending on weekly harvests. Pricing is currently steady but could firm if production slips. Buyers should communicate forward needs early and avoid relying solely on last-minute spot availability for high-volume programs.

Stonefruit

California stone fruit remains in active summer harvest. USDA reported warmer spring conditions accelerated the 2026 season, with peach and other crops developing earlier than normal. Quality is generally excellent, and consumers have good access to peaches, nectarines, plums, and related varieties. The early season means some varieties may finish sooner than typical, so August transitions should be managed carefully. Markets are mostly steady with promotional opportunity where volume peaks. Buyers should focus on maturity, firmness, and varietal timing rather than treating the category as a single uniform supply stream.

Watermelon

Watermelon supply is supported by multiple domestic regions, including the Southeast, Midwest, and California, reducing dependence on any single production area. Hot summer weather supports demand, and field heat can increase both harvest pace and quality variability. Overall availability is good, but holiday or event-driven demand can quickly tighten large seedless sizes. Quality is favorable when fruit has adequate maturity and strong internal condition. Pricing should remain mostly steady, with localized fluctuations. Procurement teams should watch regional freight because delivered cost can vary materially even when FOB supply is plentiful.

Vegetables

Asparagus

Asparagus availability is supported by Peru and Mexico, with the market more balanced than during earlier transition periods. Supply can still tighten quickly when airfreight schedules, border crossings, or field weather interrupt harvest. Quality is generally good, but dehydration and feathering remain key receiver concerns during hot summer transport. Demand is steady, and pricing is expected to remain stable to slightly firm rather than weak. Buyers should prioritize fresh pack dates, strong hydration, and reliable transportation. Promotional volume should be committed in advance because the spot market can change rapidly.

Avocados

Avocado supply is comparatively strong as Mexico's seasonal programs are supplemented by Peru, Colombia, and California. Earlier 2026 firmness eased as additional origins entered the market. Size distribution can vary, with specific foodservice counts occasionally tighter even when total volume is adequate. Quality is good, but mixed origins require careful ripening management because dry matter and maturity differ. Pricing should remain steady to moderately favorable if crossings remain consistent. Buyers should align origin and maturity with intended ripening windows and maintain flexibility on size to capture best value.

Bell Peppers

Bell pepper supply is improving as production is distributed across California, the Southeast, Canada, and Mexico depending on color and pack. Earlier spring tightness has largely moderated, although colored peppers and premium jumbo sizes may still carry firmer pricing. Heat can increase sunscald and reduce packout, especially in western districts. Overall quality is good and green bell markets should remain manageable. Expect steady pricing with localized firmness on red, yellow, and orange peppers. Buyers should maintain multiple approved origins and watch for heat-driven quality changes.

Broccoli

Broccoli production in the Salinas and Santa Maria regions is providing adequate supply. The market has stabilized from earlier disease- and weather-driven volatility, although summer heat can accelerate growth and increase hollow stem, branchiness, and occasional quality variability. Demand is moderate, keeping prices generally steady. Crown specifications can tighten faster than bunch broccoli if field yields shift. Buyers should monitor crown sizing and quality closely, but the category is currently suitable for normal purchasing programs. Near-term market direction is steady, with brief firmness possible during heat events or harvest gaps.

Brussel Sprouts

Brussels sprout supply has improved from the severe late-spring shortage, but the category remains more constrained than many core vegetables. California remains the primary source, and heat or field issues can reduce yields quickly. Quality is improving, though buyers should watch yellowing, leaf breakdown, and sizing. Demand remains solid, limiting downward price pressure. The market is expected to stay steady to firm, especially on preferred medium sizes and value-added packs. Buyers should maintain conservative inventories and secure large-volume needs ahead of time rather than depending on the spot market.

Cabbage

Cabbage supply is adequate from multiple domestic regions, producing a relatively balanced market. Green cabbage is generally more available than red or specialty types, and quality is good with normal seasonal variation in head density and wrapper leaves. Freight can represent a significant portion of delivered cost because cabbage is heavy and relatively low value per case. Pricing is expected to remain stable, with localized changes tied to regional transitions or weather. Buyers can generally purchase to normal par levels but should continue comparing regional delivered costs to optimize freight.

Carrots

Carrot supply has normalized after earlier size and yield constraints. California production remains the core source for conventional foodservice and retail packs, with Washington and other regional programs contributing seasonally. Quality is good, and jumbo, cello, and baby-carrot programs are generally stable. Heat can influence field scheduling but has not created broad market disruption. Pricing should remain steady, although packaging and freight costs continue to support the delivered market. Buyers can maintain normal inventory levels and should focus on pack-date freshness for value-added product.

Cauliflower

Cauliflower availability is adequate, supported by Salinas and Santa Maria production. The market has improved from earlier spring volatility, but the crop remains highly sensitive to heat, which can cause discoloration, ricey texture, and reduced yields. Quality is currently good overall, with intermittent variability by field. Demand is moderate and pricing should remain steady unless a sustained heat event materially reduces packout. Buyers should inspect curd color and condition closely and avoid excessive inventory because summer shelf life can shorten quickly when field temperatures rise.

ALERT

Celery

Celery supplies have improved materially from spring tightness as California production expanded. Quality is generally good, with better availability across 24- and 30-count packs. Warm temperatures can increase pith, seeder, and insect pressure, but the overall market is manageable. Demand remains steady and pricing is stable to slightly lower than the extreme levels seen earlier in the year. Buyers should return to normal inventory practices while continuing to monitor quality on arrival. Promotional opportunities may exist where shippers have strong volume, particularly on standard sizes.

Cucumber

Cucumber supply is balanced across domestic and Mexican sources, with regional summer production improving availability. The market has moved away from the transition gaps that pressured supply earlier in 2026. Quality is generally good, though heat and rainfall can create color variation, soft tips, and reduced shelf life. Demand is steady, keeping pricing relatively stable. Super Select and premium specifications may show more volatility than standard grades. Buyers should use multiple origins where possible and emphasize short turns in hot weather, but no broad shortage is expected.

Eggplant

Eggplant availability is adequate from domestic summer regions and Mexico, improving from the limited spring market. Quality is generally good, but hot weather can increase scarring, sunburn, and softening. Demand is moderate, which should keep pricing stable. Fancy and larger fruit may trade differently from choice grades depending on weekly packout. The market outlook is steady with limited risk of major escalation unless weather reduces harvests. Buyers should inspect skin condition carefully and keep inventories lean enough to protect shelf life.

Garlic

Garlic supply remains stable, supported by California production and imported product. The category is less weather-sensitive in the short term because cured inventory provides a buffer between harvest and demand. Quality is generally good, though origin, bulb size, clove fill, and sprouting risk vary. Pricing is expected to remain steady, with imported freight and currency influencing the lower end of the market. Buyers should manage origin requirements carefully and monitor storage condition, but no immediate supply disruption is anticipated.

Green Onions

Green onion supply is good from California and Mexico. Harvest volume is generally adequate, and pricing is stable. Summer heat increases the risk of dehydration, leaf tip burn, and reduced shelf life, so cold-chain management remains important. Quality is best when bunches are fresh, well-iced, and moved quickly through the distribution system. Demand is steady and should not materially pressure the market. Buyers can maintain normal order patterns but should emphasize frequent receiving and avoid carrying unnecessary days of inventory.

Green Beans

Green bean supply has improved as multiple domestic summer regions contribute volume, reducing the severe shortage risk seen earlier in the year. Quality is generally good, though rain can cause spotting and heat can reduce shelf life. Demand is steady and the market is more balanced, with pricing expected to remain stable unless weather affects a major region. Hand-picked and premium packs may continue to command a higher market. Buyers should monitor regional weather and use domestic alternatives to reduce exposure to any single production area.

Kale

Kale supplies are good from California and regional domestic growers. The crop is relatively resilient, and current availability is adequate for both conventional bunch and value-added programs. Heat can cause leaf edge burn, dehydration, and insect pressure, but overall quality remains acceptable. Demand is stable and pricing should remain steady. The key procurement issue is freshness rather than availability, so buyers should favor frequent turns, strong hydration, and proper refrigeration. No significant market escalation is expected in the near term.

Lettuce-Iceberg

Iceberg lettuce has improved from the historically tight conditions experienced earlier in 2026, but disease pressure and reduced harvestable acreage in the Salinas Valley continue to warrant caution. Quality is better, yet occasional mildew, fringe burn, insect damage, and lighter weights can still appear. Supplies are adequate for normal programs, but the market can react quickly when yields fall. Pricing is expected to remain steady to firm rather than sharply lower. Buyers should maintain flexible weights and specifications and keep close communication with shippers.

Lettuce-Leaf

Leaf lettuce, including romaine, green leaf, and red leaf, remains one of the more weather- and disease-sensitive categories. Supply has improved from spring shortages, but INSV, mildew, fringe burn, and heat stress continue to reduce usable yields in portions of the Salinas Valley. Quality is variable by field and shipper. Demand remains strong, limiting downward pricing pressure. Expect a steady-to-firm market with occasional prorates if field conditions deteriorate. Buyers should maintain source flexibility and closely monitor shelf life and arrival quality.

Lettuce-Tender Leaf

Tender-leaf items such as spring mix, baby spinach, arugula, and specialty greens are generally available but remain highly sensitive to heat, disease, and food-safety disruptions. These products have short shelf life, so even modest field stress can increase yellowing, breakdown, and shrink. Current supply is sufficient for normal demand, but the category can tighten rapidly because processors require strict quality standards. Pricing should remain stable to firm. Buyers should avoid excess inventory and prioritize reliable processors with strong cold-chain and food-safety controls.

Onions

Onion supplies are transitioning from storage and early summer regions toward broader new-crop availability. California and New Mexico programs are active, with the Northwest new crop becoming increasingly important as the season advances. Overall supply is adequate, but jumbo and super-colossal sizing may trade differently depending on field yields. Quality is generally good, though buyers should monitor neck condition and skin set during transition. Pricing is expected to remain steady with opportunities to soften as Northwest volume expands. Delivered freight remains an important cost component.

Chili Peppers

ALERT

Chili pepper production has stabilized for many varieties, but specialty types remain more volatile. Earlier reports identified shishito, habanero, and red Fresno as tighter items, and those varieties can still command premiums when harvests fluctuate. Jalapeño, serrano, poblano, and Anaheim supply is generally more manageable from Mexico and domestic regions. Quality is good, though heat can cause sunscald and dehydration. Market direction is steady overall but firm for limited specialty peppers. Buyers should separate purchasing strategies by variety rather than treating chilies as one market.

Potatoes

ALERT

The potato market is in a critical crop transition as old-crop storage supplies wind down and new-crop production expands in Washington, Oregon, and other regions ahead of the Idaho harvest. Large count availability from storage can tighten late in the season, while new crop may initially show thinner skins and different handling characteristics. Quality is generally good, but storage age should be monitored closely. Pricing is expected to remain steady to firm until new-crop volume becomes broad, then gradually ease. Buyers should communicate count-size needs early.

Squash-Yellow and Zucchini

Yellow squash and zucchini supplies are good from multiple domestic regions, with Mexico also available depending on program. These are fast-growing crops, so volume can change rapidly after weather shifts. Quality is generally good, although rain can cause scarring and disease while heat accelerates maturity and softening. Demand is steady and pricing should remain stable to slightly easier during strong regional harvests. Buyers should maintain short inventory turns and take advantage of regional sourcing to reduce freight expense and improve freshness.

Freight Update

As of August 9, 2026, the refrigerated truckload market remains considerably tighter and more expensive than a year ago, although the latest DAT data indicates that the summer rate surge is beginning to moderate. The following freight update uses the latest available DAT National Reefer Rates data and U.S. Energy Information Administration fuel data.

National Reefer Freight Outlook

The national refrigerated freight market remains firm but is beginning to ease from recent summer highs. According to DAT, national reefer spot linehaul rates averaged approximately $2.65 per mile excluding fuel for the week ending July 31. This represents a decline of $0.07 per mile, or 2.6%, week over week, but rates remain approximately $0.73 per mile, or 37.7%, higher than the same period last year. Current rates are also roughly 28.5% above the nine-year seasonal average, demonstrating that refrigerated transportation remains historically expensive despite the recent decline.

Capacity remains an important factor supporting elevated rates. DAT reported that reefer load postings increased 1.6% week over week, while available truck postings declined 10.3%. As a result, the national reefer load-to-truck ratio increased from 17.11 to 19.38, compared with only 11.36 during the comparable period last year. This indicates that although freight volumes are beginning to normalize seasonally, available refrigerated equipment remains relatively tight.

There is also a significant regional difference in transportation costs. For the week ending July 31, DAT reported average outbound reefer rates of approximately $3.17/mile in the Lower Midwest and Ohio River regions, $3.08 in California, $3.04 in the Great Lakes, $2.96 in the Upper Midwest, $2.77 in the Southeast, and $2.62 in the South Central region. California rates declined 7.5% week over week, while South Central rates declined 5.6%, suggesting that some of the seasonal pressure associated with peak summer produce movement is beginning to dissipate.

Importantly, the spot market remains above the contract market. DAT's current contract linehaul average is approximately $2.49/mile versus $2.65/mile for spot freight, leaving spot transportation about $0.16/mile more expensive. For produce procurement, this means contracted carrier capacity remains particularly valuable because last-minute spot coverage can still carry a meaningful premium.

Diesel and Fuel Costs

Fuel remains one of the largest transportation cost pressures heading into August. According to the latest U.S. Energy Information Administration data, the national average retail price for on-highway diesel reached approximately $5.348 per gallon for the week of August 3, compared with $5.313 the previous week and $4.578 at the beginning of July. That represents an increase of approximately $0.77 per gallon, or nearly 17%, in roughly one month.

The year-over-year comparison is even more significant. Diesel averaged approximately $3.80 per gallon during the first week of August 2025, meaning current prices are roughly $1.55 per gallon, or about 41%, higher year over year. Consequently, even where reefer linehaul rates are beginning to soften, total delivered freight costs may remain elevated because fuel surcharges are substantially higher than last summer.

There are some early indications that wholesale fuel pressure may be easing. Gulf Coast ultra-low-sulfur diesel spot prices peaked above $4.30 per gallon in late July before falling to approximately $3.87 per gallon on August 3. If that decline persists, retail diesel and carrier fuel surcharges could eventually moderate; however, retail pricing generally responds with a lag, so immediate transportation savings should not be assumed.

For produce transportation specifically, the combination of high diesel prices, elevated reefer rates, refrigeration-unit fuel consumption, and relatively tight truck availability means transportation budgets should remain conservative through August.

Freight Outlook (Next 2–3 Weeks)

The reefer market is expected to gradually soften during the next two to three weeks, but rates are unlikely to return quickly to 2025 levels. DAT's 35-day forecast projects national reefer spot linehaul rates at approximately $2.62 per mile by early September, only about $0.03 below the latest $2.65 level. DAT's forecast range is approximately ±$0.07 per mile, suggesting a likely market near $2.55–$2.69 per mile, excluding fuel, assuming there are no major weather or capacity disruptions.

For produce shippers, California and western growing regions should continue to command relatively strong freight rates, although seasonal pressure should gradually decline as summer produce volumes transition. Texas and South Central lanes have already begun showing some rate relief, but capacity should still be monitored closely on high-volume inbound lanes. The national load-to-truck ratio of 19.38 indicates that the market does not yet have an abundance of refrigerated equipment.

Over the next several weeks, the primary risk is therefore not necessarily another broad freight-rate spike, but continued volatility by origin market. A weather event, produce volume surge, carrier repositioning issue, or sudden tightening in California, Texas, the Midwest, or Southeast could quickly increase individual lane costs even while the national average trends slightly lower.

Procurement expectation: Plan for national reefer linehaul costs to remain approximately $2.55–$2.70 per mile excluding fuel through the remainder of August, with premium produce-origin lanes potentially running materially higher. Contracted freight should be prioritized where possible, particularly for California and long-haul produce lanes. Buyers should also avoid assuming that lower linehaul rates will translate directly into lower delivered costs until diesel begins showing a sustained decline.

Overall, the 2–3 week freight outlook is stable-to-moderately softer for reefer linehaul, but still elevated historically, while diesel remains the largest obstacle to meaningful transportation-cost relief.

Flowers—Every Day Program

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Houston, TX 77051
Tel. 713-688-0278

Scranton
301 Genet Street
Scranton, PA 18505
Tel. 570-342-3121

Tampa
8150 Eagle Palm Drive
Riverview, FL 33578
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