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The Source

Commodity of the Month - Romaine

MARKET ALERTS

Asparagus: Asparagus supplies remain tight as Peru transitions regions and Mexico production declines, with higher costs and limited larger sizes impacting availability.

Avocados: Avocado markets remain elevated due to Michoacán protests, with light harvest volumes delaying supply recovery.

Bell Peppers: Georgia is winding down as Florida takes over. Weather delays may impact quality, while Western supplies remain limited and markets stay elevated.

Blueberries: Supplies tighten as Peru declines and Argentina faces weather challenges, with a potential short-term gap ahead.

Cantaloupe: Cantaloupe season is ending, with limited supplies and elevated prices expected through November.

Cauliflower: Cauliflower supplies tighten as Salinas winds down, with firm markets expected until Yuma ramps up.

Celery: Celery markets remain steady with strong availability, quality, and promotional opportunities through Thanksgiving.

Pineapple: Pineapple supplies remain tight due to weather impacts, with elevated prices and limited availability through year-end.

Potatoes: Potato supplies remain tight, especially 40–80 counts, with strong holiday demand supporting markets.

Strawberries: Strawberry supplies remain tight due to California weather impacts, with Mexico and Florida slowly improving.

Tomatoes: Tomato supplies remain tight nationwide, with markets elevated through November and improvement expected later for grape, Roma, and Round varieties.

NOVEMBER 18, 2026

CROP UPDATES

Yuma has taken over leafy green production, improving volumes, quality, and pricing. Cauliflower and strawberries remain the biggest concerns, with weather and limited supplies keeping markets tight heading into Thanksgiving. Read more

WEATHER

California: Heavy rain continues through Thursday with 1.5 to 2.5 inches expected. Frost and freezing temperatures are likely south of King City Thursday and Friday nights, with light rain returning late Saturday.

Mexico: Seasonal temperatures continue through November 23, with dry weather through Friday and a slight chance of light showers this weekend.

Florida: Scattered showers continue through Saturday, with heavy rain and flooding possible along Florida's east coast before drying Sunday.

Arizona: Light rain is possible Thursday near Borrego and Coachella, with dry conditions elsewhere. Gusty winds and patchy frost are expected into Saturday morning.

FREIGHT

Freight this week sees suppliers shifted from Northern California to the southern growing region in Yuma, AZ. Delays at the supplier level seem to be peaking in Yuma this week and should improve as the season progresses.

PRO FRESH LOGISTICS

IN PEAK SEASON

- Apples
- Blackberries
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Commodity Updates

Apples

Finally we have some decent volumes to play with! All varieties are in good supply on food service sizes. Some supply tightness on reds and gala due to demand from Mexico.

Commodity/Region	Supply	Price	Quality
Hudson, New York (September - June)	Steady	$$$	Good

Asparagus

ALERT

Peru is transitioning from southern to northern asparagus production, with southern supplies expected to meet Thanksgiving demand before declining in early December. Northern production is ramping up, though El Niño conditions, higher air freight costs, and limited ocean containers may impact availability. In Mexico, supplies have tightened as production declines in Baja and Sonora, driving prices higher. Limited larger sizes and quality challenges persist, while upcoming production from Central Mexico is expected to help bridge supply until the 2027 Caborca season.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Light	$$$	Fair
Peru (Year Round)	Light	$$$	Fair
Mexico (Ciudad Obregon) (Year Round)	Light	$$$	Fair

Avocados

ALERT

Avocado markets remain elevated due to ongoing protests in Michoacán. Both the Flora Loca and Adventajada crops are in production, with dry matter and oil content in the mid-to-high 20% range, providing consistent ripening. Peak sizing continues to be 48s and 60s. Harvest has resumed, but volumes remain very light and are expected to take another week to replenish the supply pipeline.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	$$$	Good
California (April - July)	Light	$$$	Good

Bell Peppers

ALERT

East: Georgia production is winding down as colder temperatures arrive, while Florida takes over. Recent heavy rains may delay harvests and increase choice/#2 yields.
West: Coachella remains the main source of #1 peppers, with Hermosillo starting light on smaller, mostly choice fruit. Markets remain elevated and could rise further.

Commodity/Region	Supply	Price	Quality
California (May - October)	Light	$$$	Good
Mexico (November - May)	Light	$$$	Good

Price Key: $$$ *-Low,* $$$ *-Steady,* $$$ *-High*

Supply Partners



Commodity Updates

Berries (Blackberries)

Production from Central Mexico is expected to increase into December, with markets likely to soften.

Commodity/Region	Supply	Price	Quality
California (Year Round)	High	$$$	Good

Berries (Blueberries)

ALERT

Peruvian imports are declining heading into late November, while Central Mexico supplies remain light but steady. Argentine imports continue to decrease due to unfavorable weather, and some shippers expect a brief supply gap next week as Peru winds down and Argentina's production remains limited.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	$$$	Excellent

Berries (Raspberries)

Supplies from Central Mexico and Baja continue to improve, with volumes expected to increase through late November.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	$$$	Good

Berries (Strawberries)

ALERT

Strawberry supplies remain very tight as rain and El Niño conditions continue to limit California harvests. Central Mexico is slowly increasing production, while Florida has started light and is also facing wet weather. Florida volumes are expected to improve by the end of November.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	$$$	Fair

Price Key: $$$ *-Low,* $$$ *-Steady,* $$$ *-High*

Supply Partners Driscoll's Only the Finest Berries™ naturipe FARMS



Commodity Updates

Broccoli

Broccoli supplies continue to improve as production and harvest volumes increase. While Diamondback Moth pressure remains in some fields, availability is better overall. Markets, however, are trending higher due to strong demand and ongoing production challenges.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	$$$	Fair
Santa Maria, California (Year Round)	Steady	$$$	Fair
Salinas, California (May- October)	Light	$$$	Fair

Brussel Sprouts

Brussels sprout demand continues to strengthen, with markets expected to rise and pricing likely to increase in the near term.

Commodity/Region	Supply	Price	Quality
Mexico (December-August)	Light	$$$	Good
Oxnard / Salinas, CA (May - July) (July-Dec)	Light	$$$	Good

Carrots

Carrot supplies remain steady, with Lancaster/Cuyama as the primary growing region. Production will gradually transition to Bakersfield next month, with good sizing and availability across all pack sizes.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	High	$$$	Excellent
Kern County (October - Feb)	Steady	$$$	Good
Various Northwest Regions (July - October)	Steady	$$$	Good

Cauliflower

ALERT

The cauliflower market is strengthening as the Salinas season winds down. Reduced harvest volumes, increasing seasonal demand, and the upcoming transition to Yuma are tightening supplies. With several shippers expected to finish Salinas production by late November, markets are expected to remain firm until Yuma production ramps up.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	$$$	Good
Santa Maria, California (Year Round)	Light	$$$	Good
Salinas, California (May - October)	Steady	$$$	Good

Celery

ALERT

Celery markets have stabilized after early-month increases and are expected to remain steady through Thanksgiving. Santa Maria and Salinas continue to offer good availability across all sizes, with strong quality and flexible pricing creating excellent promotional opportunities.

Commodity/Region	Supply	Price	Quality
Oxnard, California (Year Round)	Steady	$$$	Good

Price Key: $$$ -Low, $$$ -Steady, $$$ -High

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Commodity Updates

Citrus (Grapefruit)

Star Ruby grapefruit are available, peaking on 48-count fruit, with shipments coming from Riverside and the San Joaquin Valley.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	$$$	Good
Texas (October - April)	Light	$$$	Good

Citrus (Lemons)

The lemon market remains steady, with supplies expected to improve as San Joaquin Valley production ramps up in the coming weeks. Ventura County remains limited, while the Arizona/California Desert is supplying much of the current volume. Peak sizing is 140-count and larger.

Commodity/Region	Supply	Price	Quality
CA Desert/Yuma (October - February)	Steady	$$$	Good
San Joaquin Valley (October - May)	Light	$$$	Good

Citrus (Limes)

Mexico: Lime supplies are tightening due to heavy rainfall and reduced blooms in Veracruz. Smaller sizes remain limited, and prices are expected to continue rising over the next two weeks.
Colombia: Production has rebounded, with strong fall-season volumes expected through December. Quality and juice content remain excellent, though higher Mexican markets are putting upward pressure on pricing.

Commodity/Region	Supply	Price	Quality
Veracruz (Year Round)	Steady	$$$	Good

Citrus (Oranges)

Navel season is underway, with peak sizing on 88-count and smaller fruit. Minimal gassing is currently needed to enhance color, and cooler nights will soon allow the fruit to color naturally.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (Year Round)	High	$$$	Good

Cucumber

Eastern production is transitioning from Georgia to Florida, where quality is improving but volumes remain limited. Baja supplies continue to tighten as production shifts to Sonora and Sinaloa. New crop production in Sinaloa is ramping up, with improved availability and more favorable pricing expected over the next two weeks.

Commodity/Region	Supply	Price	Quality
Mexico (November - May)	Steady	$$$	Good
Baja California (May - October)	Light	$$$	Good
Ohio/NC/MI/NJ (June - September)	Steady	$$$	Good

Price Key: $$$ *-Low,* $$$ *-Steady,* $$$ *-High*

Supply Partners Sunkist FRESH LINK



Commodity Updates

Eggplant

Georgia continues to produce strong volumes with good quality, while Western supplies are improving as Mexican production increases through Nogales. Markets are steady to slightly lower, with favorable availability and pricing expected in the coming weeks.

Commodity/Region	Supply	Price	Quality
California (May - October)	Steady	$$$	Good
Ohio/NC/MI (June - September)	Steady	$$$	Good

Garlic

The 2026 California crop continues to ship, with production expected to run through late September. Quality is good, and availability remains steady.

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Steady	$$$	Good
Bakersfield, California (Year Round)	Steady	$$$	Good
Gilroy, California (Year Round)	Steady	$$$	Good

Grapes

Domestic red and green seedless supplies continue to tighten as the season approaches its end. Domestic greens will finish next week. Domestic red seedless will continue to offer good value until the end of the month. Imported grapes have begun arriving on both coasts with the heavier volume in the east where lower freight costs are helping keep imported green grapes competitively priced against domestic supplies.

Grapes (Green)

Commodity/Region	Supply	Price	Quality
	Steady	$$$	Good

Grapes (Red)

Commodity/Region	Supply	Price	Quality
Mexico (May - June)	High	$$$	Good

Green Onions

Supplies continue to be good on Green Onions out of Mexico. Look for this market to stay mostly steady going into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	$$$	Good

Kale

Kale supplies and quality remain good, with steady market conditions expected into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	$$$	Good
Oxnard, California (Year Round)	Steady	$$$	Good
Salinas, California (May - October)	Steady	$$$	Good

Price Key: $$$ *-Low,* $$$ *-Steady,* $$$ *-High*

Supply Partners



Commodity Updates

Lettuce Iceberg

Romaine supplies remain very limited as INSV pressure and lower yields continue to impact Salinas and Santa Maria. Huron is beginning to add volume, but overall availability remains tight. Quality issues persist, including discoloration, misshapen heads, and occasional insect damage. Markets are expected to remain strong as limited supplies and steady demand continue to support higher pricing.

Commodity/Region	Supply	Price	Quality
Santa Maria, California (March-December)	Light	$$$	Fair
Salinas, California (May - October)	Light	$$$	Fair

Lettuce Leaf

Romaine disease pressure remains light, and green and red leaf quality continues to improve. However, supplies remain below budget, with demand exceeding harvest volumes. Romaine hearts are moderately available, but tight supplies are keeping markets strong, with prices in the mid-$70s expected to hold.

Commodity/Region	Supply	Price	Quality
Salinas, California (May - October)	Steady	$$$	Fair

Lettuce Tender Leaf

Quality and supplies remain strong across all leaf items. Improved availability has created promotional opportunities for tender leaf products, while other row crops continue to face tight supplies.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	$$$	Good
Oxnard, California (Year Round)	Steady	$$$	Good
Salinas, California (May - October)	High	$$$	Good

Melon (Cantaloupe)

ALERT

Domestic cantaloupe season is ending, with production expected to finish within the next few days. We recommend transitioning to offshore or Mexican supplies. Availability remains limited as offshore inventories build, and elevated pricing is expected through November.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	Light	$$$	Good

Price Key: $$$ *-Low,* $$$ *-Steady,* $$$ *-High*

Supply Partners Taylor Farms, Andy Boy, Dole, Mann's, Queen



Commodity Updates

Melon (Honeydew)

Domestic honeydew production in Yuma is nearing the end of the season. Nogales supplies are expected to become more readily available toward the end of the month.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	Steady	$$$	Excellent

Melon (Watermelon)

Watermelon demand is increasing while supplies remain steady. Nogales crossings continue, with growers closely monitoring weather conditions that could impact production and availability.

Commodity/Region	Supply	Price	Quality
Arizona (June-July) (October-November)	Steady	$$$	Good

Mushroom

New government duties are expected to drive prices higher as demand continues to outpace available supplies.

Commodity/Region	Supply	Price	Quality
Nationwide	High	$$$	Excellent

Onions

Storage onion season is in full swing, with improved yields across the region. Supplies remain steady despite strong demand and shorter-than-expected regional production, while freight costs continue to drive the market.

Commodity/Region	Supply	Price	Quality
Eastern Orgeon/Parma, ID (August - April)	High	$$$	Excellent
San Joaquin Valley (May - August)	Light	$$$	Good
Tri-Cities, Washington (July - April)	High	$$$	Good

Pears

Pear supplies continue to face challenges as the crop has shifted heavily toward larger fruit sizes, limiting availability of the smaller counts preferred by the foodservice industry. Buyers are competing for limited smaller sizes, driving FOB prices higher, while expected relief has yet to materialize as packers continue to navigate sizing and supply constraints.

Commodity/Region	Supply	Price	Quality
	Steady	$$$	Good

Price Key: $$$ -Low, $$$ -Steady, $$$ -High

Supply Partners JC Watson Packing Company, Rainier Fruit Company



Commodity Updates

Pineapples

ALERT

Heavy rain, drought, high temperatures, and El Niño continue to tighten pineapple supplies through at least the end of November, with possible shortages into year-end. Contract orders should remain unaffected, but limited open-market availability may keep prices elevated. Crownless 8- and 10-counts, along with organic pineapples, remain especially tight, while overall quality continues to be good.

Commodity/Region	Supply	Price	Quality
Costa Rica (Year round)	Light	$$$	Good

Potatoes

ALERT

New crop potatoes are in storage, with larger and smaller sizes remaining limited. Strong holiday demand continues to tighten 40-80 count supplies, and this trend is expected throughout the season. Washington potatoes are showing excellent quality with mid-size counts peaking. Sweet potatoes from California and North Carolina remain limited until new crop supplies arrive, while Mississippi production is off to a slow start.

Commodity/Region	Supply	Price	Quality
Idaho Falls, Idaho (August-July)	Steady	$$$	Good
Pasco, Washington (August-July)	Steady	$$$	Excellent

Squash

East supplies from Georgia and Florida continue to increase, easing prices while quality remains good. In the West, the season is winding down with production declining. Mexico markets remain steady but are expected to soften as supplies improve.

Commodity/Region	Supply	Price	Quality
Mexico (November - May)	Steady	$$$	Good
California (May - October)	Light	$$$	Good

Stone Fruit

The domestic stone fruit season has ended. Imported peaches are expected in early December, followed by nectarines 1 to 2 weeks later and plums after the New Year. In the meantime, domestic kiwi, Asian pears, pomegranates, and persimmons remain readily available and provide excellent seasonal options.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley	Light	$$$	Good

Tomatoes

ALERT

Tomato supplies remain tight nationwide across Roma, Round, and Grape varieties due to slow Florida production and weather-related challenges in Mexico. Western supplies also remain limited, with ongoing sizing and quality issues. Markets are expected to stay elevated through November, with gradual improvement in grape tomatoes by late November and better availability of Roma and Round tomatoes not expected until mid-to-late December or early January.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	$$$	Fair
Baja California (Spring/Summer - November)	Light	$$$	Fair
Florida (November - May)	Light	$$$	Fair

Price Key: $$$ *-Low,* $$$ *-Steady,* $$$ *-High*

Supply Partners Wada Farms Marketing Group, LLC · Fresh Link · Dole



Weather Updates



CALIFORNIA

Moderate to heavy showers are expected Wednesday morning through Thursday night. Morning lows will range from the upper 20s to mid-30s south of Soledad, with milder temperatures in the upper 30s to low 50s closer to the coast. Rainfall totals are forecast to range between **1.5 and 2.5 inches**. Frost is expected Thursday night south of King City, followed by another freeze Friday night in the same areas. A second weather system is forecast to arrive late Saturday, bringing another chance of light rain. Additional rainfall through Sunday night is expected to total up to 0.5 inches.



MEXICO

Seasonal temperatures will persist through November 23. Dry conditions are expected Thursday through Friday before a weak weather system brings a chance of isolated light showers from the weekend into Monday. Rainfall totals are expected to range from 0.02 to 0.15 inches where showers occur. High temperatures will remain mostly in the mid-60s to mid-70s, while overnight lows will range from the mid-40s to mid-50s through Monday morning.



FLORIDA

The overall pattern remains unchanged through Saturday, with a stationary front lingering across the Florida Peninsula. An area of low pressure is expected to develop along the front Friday into Saturday, bringing isolated to scattered showers and thunderstorms. Most areas are expected to receive 0.30 to 0.60 inches of rainfall. However, the east coast of Florida could see multiple rounds of heavy rain, with totals of 3 to 6 inches and isolated amounts nearing 10 inches through Saturday. Dangerous flooding is becoming increasingly likely in these areas. Drier conditions are expected to return Sunday into Monday.



ARIZONA

A Pacific trough will pass north of the region Thursday, bringing light rain near Borrego with totals around 0.10 inch and a slight chance of showers in Coachella. Dry conditions are expected elsewhere. West winds will strengthen late Wednesday through Thursday, with gusts of 40 to 55 mph across exposed southeast California slopes and passes before easing Thursday evening. Highs will remain in the upper 60s to mid-70s, while Saturday morning lows will range from the upper 30s near Salome to the upper 40s and low 50s across Yuma County. Patchy frost is possible in colder, sheltered areas near Salome.

For more information: https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h

Freight Updates

Freight this week sees suppliers shifted from Northern California to the southern growing region in Yuma, AZ. Delays at the supplier level seem to be peaking in Yuma this week and should improve as the season progresses.



U.S. On-Highway Diesel Fuel Prices*(dollars per gallon) full history XLS

	11/02/26	11/09/26	11/16/26	Change from 2 year ago	Change from year ago	Change from week ago
U.S.	6.292	6.127	5.937	↑ 2.446	↑ 2.069	↓ -0.190
East Coast (PADD1)	6.025	5.920	5.782	↑ 2.230	↑ 1.926	↓ -0.138
New England (PADD1A)	6.416	6.349	6.225	↑ 2.474	↑ 2.204	↓ -0.124
Central Atlantic (PADD1B)	6.486	6.412	6.309	↑ 2.537	↑ 2.310	↓ -0.103
Lower Atlantic (PADD1C)	5.814	5.694	5.541	↑ 2.090	↑ 1.754	↓ -0.153
Midwest (PADD2)	6.402	6.201	5.967	↑ 2.501	↑ 2.054	↓ -0.234
Gulf Coast (PADD3)	5.912	5.741	5.547	↑ 2.394	↑ 2.057	↓ -0.194
Rocky Mountain (PADD4)	6.445	6.206	6.011	↑ 2.553	↑ 2.198	↓ -0.195
West Coast (PADD5)	7.272	7.110	6.948	↑ 2.799	↑ 2.389	↓ -0.162
West Coast less California	6.575	6.429	6.269	↑ 2.563	↑ 2.089	↓ -0.160
California	8.076	7.897	7.733	↑ 3.074	↑ 2.737	↓ -0.164

prices include all taxes

For more information: https://www.eia.gov/petroleum/gasdiesel/



Crop Updates

Touchdown in Yuma

The transition to the desert is largely behind us now, and Yuma has officially taken over as the center of our produce world.

After a few weeks of uncertainty,leafy green supplies are finally finding their footing. Volumes have improved, quality has stabilized, and pricing has returned to more normal levels as the desert becomes the industry's primary growing region.

That's welcome news after navigating the usual transition challenges that come with moving production from California to Arizona each fall.
Not everything has made the move quite as smoothly.

Broccoli and cauliflower continue to lag behind. Supplies are still being transferred down from Salinas while growers wait for desert acreage to reach full production. Broccoli has remained relatively manageable, but cauliflower continues to be the tighter of the two items. Supplies remain limited, and meaningful relief isn't expected until additional desert production comes online in December.

Of course, just as things start settling down, California weather is back in the conversation.

Rain is expected across several California growing regions this week, with some localized areas forecast to receive up to two inches. Under normal circumstances, rain in November isn't necessarily a major story. This year, however, many strawberry fields are still recovering from recent weather events, making them particularly vulnerable to additional disruptions.







Crop Updates



As a result, strawberries remain one of the market's biggest trouble spots. Production remains below seasonal norms across California, and growers in Oxnard continue to report lighter yields as fields work through recovery efforts. Smaller fruit sizing has added another layer of difficulty, further reducing available volume and keeping supplies tight.

The concern is that another round of rain could slow harvest crews down, create quality issues, and keep supplies tighter than anyone would like heading into the holiday pull. Fill rates remain inconsistent, order cuts continue across much of the industry, and pricing remains elevated as shippers focus on fulfilling existing commitments.



The rest of the berry category paints a somewhat different picture. Blackberry supplies continue to improve with steady volume crossing from Mexico, and raspberry availability remains relatively stable. Blueberries remain available from multiple growing regions, but supplies have started to tighten as Peru moves beyond peak production and Argentina continues to battle weather-related challenges. Growers are also beginning to discuss the possibility of a short-term supply gap as we move deeper into the holiday season.



As we head toward Thanksgiving week, the good news is that the biggest transition hurdles appear to be behind us. Lettuce and leafy greens have settled into their desert home, bringing a much more predictable market than we saw just a few weeks ago.

The biggest watchouts remain cauliflower and strawberries, with California weather likely determining how much additional pressure develops in the weeks ahead. For now, Yuma is in the driver's seat, and the focus has shifted from transition challenges to managing a few lingering supply concerns as we head into the holiday season.