

The Source

Commodity of the Month - Tender Leaf

MARKET ALERTS

Asparagus: Asparagus supplies remain tight, with Mexican availability limited and Peruvian pricing firm. Southern Peru should provide some stability through Thanksgiving.

Citrus (Lemons): Lemon supplies remain tight, keeping prices firm. District 2 is in full production, with offshore fruit becoming available.

Citrus (Oranges): California Valencias are heavily weighted to larger sizes, with 113ct and 138ct extremely limited. Flexibility and substitutions to 72ct or 88ct will be necessary.

Pineapple: Pineapple supplies will tighten through mid-October, with limited open-market availability and firming prices. Contract orders should remain unaffected.

Potatoes: Old-crop Burbanks are finished. New-crop sizing remains challenging, especially 40/70ct. Washington quality is strong, but large and small sizes are tight. Sweet potato supplies remain limited.

Strawberries: Strawberry supplies remain extremely tight, with limited open-market fruit. Salinas and Watsonville are winding down, while Santa Maria improves into September.

AUGUST 26, 2026

CROP UPDATES

As September approaches, school demand is increasing while summer supplies tighten. Salinas lettuce and leaf markets are strengthening due to disease and yield issues, small citrus remains limited, and strawberries continue to face tight supplies and elevated pricing. Overall, expect more active markets and tighter availability heading into September. [Read more](#)

WEATHER

California: Hot inland through Thursday, then cooling closer to normal by the weekend.

Mexico: Warm and stable through August 30, with isolated showers and thunderstorms. Highs in the low 70s–low 80s, lows in the low 50s–near 60°F.

Florida: Warm and humid with daily afternoon/evening storms. Highs in the low–mid 90s, with lows in the 70s–80s.

Arizona: Very hot through Thursday, with highs in the 110s–120s, then cooling into the 100s–low 110s by Sunday. Scattered monsoon showers are expected Friday through the weekend.

FREIGHT

Freight this week sees hints of fall markets showing up. Shipper delays and product availability is slowly starting to become a part of loading out west. As the days get shorter, we anticipate subtle changes in loading times, and that will affect transit. We are actively preparing for transition to the southern growing regions.

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LOGISTICS

IN PEAK SEASON

- Blueberries
- Grapes
- Carrots
- Stone Fruit



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Commodity Updates



Apples

School demand and limited availability are putting upward pressure on the apple market. Fujis, Pinks, Reds, Golds, and Grannys are all seeing price increases, with Fujis expected to be nearly nonexistent over the next two weeks. Gala and Honeycrisp are the bright spots, with new-crop harvesting underway and the Gala market remaining stable.

Commodity/Region	Supply	Price	Quality
Yakima, Washington (August - July)	Light	\$\$\$	Good



Asparagus

ALERT

Mexican asparagus remains in very limited supply, with Central Mexico/Guanajuato/Bajio finished for the season. Northern Baja is providing the best quality and should continue through late September or early October, while Southern Baja remains limited due to heat and weather concerns. Peruvian supply is also challenging, with poor quality in the North and strong demand keeping prices elevated. Southern Peru is seeing a slight increase in supply, which should provide more stability through Thanksgiving. Overall, expect tight supplies and firm pricing to continue in the coming weeks.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Light	\$\$\$	Fair
Peru (Year Round)	Light	\$\$\$	Good
Ohio/NC/MI/NJ (June - September)	Light	\$\$\$	Good
Mexico (Ciudad Obregon) (Year Round)	Light	\$\$\$	Good



Avocados

Markets remain steady on 48/60/70ct, with larger fruit commanding a premium. California and Peru are also moving well but are beginning to wind down.

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



Bell Peppers

California remains plentiful, with good quality and steady supplies. Midwest and Northeast production is also strong, with affordable domestic FOBs. Supplies should remain ample through early September, making peppers a strong promotional item.

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

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

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Commodity Updates



Berries (Blackberries)

Lighter transfers from Mexico have helped firm the market. Shippers have intentionally pulled back from last week's volumes in response to slower movement.

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

The last of the PNW crop is coming out of Washington, with Peruvian and Central Mexico product expected to increase in the marketplace.

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

Lighter transfers from Mexico have helped firm the market, as shippers have intentionally reduced volumes from last week in response to slower movement.

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

ALERT

Strawberries remain in a demand-exceeds-supply situation, with open-market fruit extremely limited as shippers focus on contracts and prior commitments. Tight supplies are expected through August due to a production gap in Salinas and Watsonville caused by July's heat. Santa Maria should see improved production next week, while Baja and Central Mexico are expected to begin production in September.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Light	\$\$\$	Fair
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Broccoli

Broccoli supplies remain on the tight side. Recent fields have come on, but production is now transitioning to younger fields. Expect the market to strengthen heading into next week.

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 supplies remain on the tighter side. With demand beginning to pick up, expect the market to strengthen slightly.

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



Carrots

The Spring crop in Bakersfield is sizing well with good yields and should continue for the next 2-3 weeks. We will then transition to the Lancaster/Cuyama Summer crop, which is expected to run through October before returning to Bakersfield. Grimmway has also begun its Minnesota program, which is expected to run through late November/early December. Pricing will remain in line with California.

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

Cauliflower supplies are strong across all growing regions this week. Expect the market to remain steady heading into next week.

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



Celery

The market is steady to start the week and is expected to remain that way throughout the week. Santa Maria/Oxnard and Salinas will have all sizes available. School demand has been relatively slow, and shippers are flexing, making this a good commodity to promote. Quality remains above average across most shippers.

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 are available, peaking at 48ct, with shipments coming out of Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

ALERT

The lemon market remains steady, with tight supplies keeping pricing firm in the near term. Offshore product is available on both coasts, while District 2 (Ventura County/Oxnard) is in full production and supplying the majority of the fruit.

Commodity/Region	Supply	Price	Quality
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Oxnard/Ventura (February - September)	Steady	\$\$\$	Fair
San Joaquin Valley (October - May)	Light	\$\$\$	Good



Citrus (Limes)

Good-quality fruit remains extremely limited and concentrated among a few suppliers, driving prices higher. Heavy grading continues, with even the best available fruit below normal quality expectations. New crop should improve quality over the next 1-2 weeks, but limited volume will likely keep prices elevated.

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

ALERT

The California Valencia crop is heavily weighted toward larger sizes, with production peaking on 56ct and 72ct. Small sizes, particularly 113ct and 138ct, remain extremely limited and are expected to stay tight through the end of the season. Flexibility on size and grade will be important for consistent order coverage, with substitutions to larger fruit likely necessary. Please communicate these sizing challenges to schools and DOD programs and encourage 72ct or 88ct options when possible.

Commodity/Region	Supply	Price	Quality
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San Joaquin Valley (Year Round)	Light	\$\$\$	Fair
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Cucumber

Baja supplies remain light due to weather, pushing markets higher. Eastern and local production is available with generally good quality. Markets are expected to remain firm into September until mainland Mexico production ramps up.

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

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

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Commodity Updates



Eggplant

Heavy production and good quality continue in North Carolina and New Jersey, while California production is improving with steady pricing. Markets should remain soft, making eggplant a strong promotional item through August.

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



Garlic

We are now into the new 2026 California crop, which is expected to run through September 2027.

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



Grapes

The California grape market remains mostly steady, with most shippers peaking on Large and Extra Large sizes across both red and green seedless varieties. Barring significant weather issues, the market should remain steady, with excellent availability and promotable pricing.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies are beginning to tighten as rain and warmer weather lead to shorter yields. Expect the market to remain firm heading into the weekend.

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



Kale

Kale supplies and quality remain good, with steady conditions expected to continue 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

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Commodity Updates



Lettuce Iceberg

Lower yields are being reported in both the Salinas Valley and Southern California, keeping the market active. INSV has created an industry-wide shortage, with arrivals showing outer-leaf discoloration, misshapen heads, and occasional insect damage. Weights are ranging from 37-44 lbs. Expect the market to strengthen throughout the week.

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



Lettuce Leaf

Issues with romaine, green leaf, and red leaf have surfaced in both the Salinas Valley and Southern California. INSV has caused crop damage across multiple suppliers, while fringe and tip burn are being reported on arrivals. Romaine hearts remain moderately available, and current demand is being met. Expect the market to strengthen by the end of the week and into next week.

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



Lettuce Tender Leaf

Spinach, arugula, and spring mix supplies remain strong, with good quality and ample availability for normal business.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Yuma, Arizona (November - May)	Steady	\$\$\$	Good



Melon (Cantaloupe)

Domestic cantaloupes are loading from Central California, with fruit peaking on 9ct. Supplies are good, with promotional opportunities available on new-crop fruit.

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

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

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Commodity Updates



Melon (Honeydew)

Domestic honeydews are loading from the Westside region of Central California, with steady supply and demand. Fruit is peaking on 5ct, with decent availability and good sizing.

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



Melon (Watermelon)

Watermelon demand remains steady as we approach the upcoming holiday. Retail ADS will begin over the weekend, and the market is expected to remain strong through the remainder of the month.

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



Mushroom

Due to new government duties, expect prices to increase as demand continues to exceed supply.

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



Onions

Summer onions are officially finished, with storage onions now driving the market. Supplies remain tight due to strong demand and regional issues ending earlier than expected. Freight costs are adding pressure through the holiday, while suppliers continue building inventory. Larger sizes remain a challenge.

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

Washington pear growers are in full production on Bartletts, with many also beginning Starkrimson. The market remains mostly steady, while limited California Bartletts are still available from the Central Valley.

Commodity/Region	Supply	Price	Quality
	Steady	\$\$\$	Good

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

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Commodity Updates



Pineapples

ALERT

Pineapple supplies are expected to tighten over the next 4–6 weeks due to the natural flowering season, limiting open-market availability and potentially increasing prices. Contract orders should remain unaffected, with quality expected to stay good. Supplies will become very tight through mid-October. 6ct and 7ct crowned fruit are increasing, while 8ct remains steady. Crownless 8ct and 10ct, along with organic fruit, remain limited.

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

ALERT

Old-crop Burbank potatoes are officially finished for the season. New-crop potatoes are experiencing sizing issues, particularly 40/70ct, which is expected to remain a challenge throughout the season. Lead time will be important to secure product. Washington potatoes are showing great quality, peaking on mid sizes, while larger and smaller counts remain tight. Color potatoes are available from ID, WA, CA, MN, and WI. California and NC sweet potatoes remain limited until new crop, while Mississippi sweets are off to a slow start.

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



Squash

California and Baja supplies remain tight, especially on yellow squash, keeping markets elevated. New Jersey and New York have good availability and quality. Local Midwest production is limited, while Georgia fall production is beginning to ramp up.

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



Stone Fruit

Peach and nectarine harvest is winding down and is expected to finish within the next three weeks. Sizing has improved significantly, with small fruit becoming very limited. Small black plums remain plentiful and attractively priced. The Chilean kiwi market continues to strengthen on lighter supplies, with limited availability. Chile will remain the primary source until California production resumes in October.

Commodity/Region	Supply	Price	Quality
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San Joaquin Valley	Steady	\$\$\$	Good
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Tomatoes

Rounds: Demand is shifting toward California, Mexico, and the Midwest as Eastern production declines. Overall availability is tightening, pushing prices up modestly. California remains the best source for jumbo and XL sizes.
Romas: Supplies are generally stable, though rain-damaged quality in the East and lower California yields are putting slight upward pressure on prices.
Grape & Cherry: Eastern production is slowing and Mexican supplies remain light, with heavier grading helping maintain consistent quality. Prices should remain steady until new volume arrives in the coming weeks.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Steady	\$\$\$	Good
Baja California (Spring/Summer - November)	Steady	\$\$\$	Good
California (July - October)	Light	\$\$\$	Good

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

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Weather Updates



CALIFORNIA

Strong high pressure will bring near to slightly above-normal temperatures along the coast and well above-average temperatures inland through Thursday. Morning lows will range from the low 50s to mid-60s. Daytime highs will reach the upper 70s to mid-80s along the coast, low to upper 90s in the Santa Clara Valley and Soledad, and mid-90s to 108°F south of Soledad.

The high-pressure system will weaken Friday, bringing temperatures closer to normal through the weekend. By Sunday, highs will be in the upper 60s to low 70s along the coast and mid-70s to mid-90s inland.



MEXICO

Isolated showers and thunderstorms are possible over the next five days, with most showers producing 0.05"–0.30" of rain. Higher totals are possible with thunderstorms. Temperatures will remain warm with little change through August 30, with highs in the low 70s to low 80s and lows in the low 50s to near 60°F through Sunday.



FLORIDA

Warm and humid conditions will continue, with daily isolated to scattered afternoon and evening thunderstorms. Afternoon wind gusts may reach around 15 mph through midweek across most of Southeast Florida and the Tampa Bay area. Highs will remain in the low to mid-90s through the end of the week, with morning lows mainly in the low 70s to low 80s through Friday.



ARIZONA

High pressure continues to dominate the Southwest, bringing much warmer-than-normal temperatures to the low deserts through midweek. Increasing cloud cover should help cool temperatures heading into the weekend.

Highs will reach the 110s–120s Wednesday and Thursday before dropping into the 100s to low 110s by Sunday. Morning lows will remain in the 80s–90s through Friday, easing a few degrees by Sunday. Scattered light monsoon showers are expected across central and southwest Arizona beginning Friday and continuing through the weekend.

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



Freight Updates

Freight this week sees hints of fall markets showing up. Shipper delays and product availability is slowly starting to become a part of loading out west. As the days get shorter, we anticipate subtle changes in loading times, and that will affect transit. We are actively preparing for transition to the southern growing regions.



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

[full history](#) [XLS](#)

	08/10/26	08/17/26	08/24/26	Change from		
				2 year ago	year ago	week ago
U.S.	5.257	5.454	5.652	↑ 2.001	↑ 1.944	↑ 0.198
East Coast (PADD1)	5.193	5.340	5.498	↑ 1.773	↑ 1.772	↑ 0.158
New England (PADD1A)	5.514	5.545	5.716	↑ 1.747	↑ 1.748	↑ 0.171
Central Atlantic (PADD1B)	5.535	5.652	5.840	↑ 1.920	↑ 1.924	↑ 0.188
Lower Atlantic (PADD1C)	5.034	5.204	5.350	↑ 1.722	↑ 1.719	↑ 0.146
Midwest (PADD2)	5.181	5.435	5.636	↑ 2.009	↑ 1.938	↑ 0.201
Gulf Coast (PADD3)	5.044	5.237	5.481	↑ 2.164	↑ 2.153	↑ 0.244
Rocky Mountain (PADD4)	5.271	5.427	5.537	↑ 1.929	↑ 1.789	↑ 0.110
West Coast (PADD5)	6.033	6.203	6.407	↑ 2.135	↑ 1.946	↑ 0.204
West Coast less California	5.526	5.699	5.859	↑ 1.966	↑ 1.756	↑ 0.160
California	6.618	6.785	7.040	↑ 2.333	↑ 2.167	↑ 0.255

*prices include all taxes

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



Crop Updates

September Brings a Shifting Supply Picture

As we close out August, a little more demand is starting to come back into the market. Schools are in full swing, universities are ramping up, and that added pull is starting to show up just as some of our summer crops are getting a little tired.

Here in the Salinas Valley, lettuce and leaf markets are beginning to move higher. Iceberg has led the way, with romaine and green leaf starting to follow. There is still product, but disease pressure from INSV and Sclerotinia, along with mildew, insects, internal burn and lighter weights, is taking a bite out of yields. Planted acreage may look adequate on paper, but the more important number right now is how much of that acreage can actually be harvested and packed. With demand improving at the same time, we should expect these markets to stay active as we move into September.

On the citrus front, the small-size shortage we have been talking about for months never really went away. A combination of offshore imports and lighter summer demand gave the market a little breathing room and, at times, a false sense of availability. Now that schools are back and demand has returned to more normal levels, we are being reminded that the California size structure has not changed. Valencias remain heavily weighted toward larger fruit, while 113s and 138s are extremely limited. Imports will continue to help, but small fruit is expected to remain tight through the balance of the Valencia season and likely into the beginning of the California Navel crop in October. Lead time and flexibility on size, grade and country of origin will remain important.





Crop Updates

Berries are also in a bit of a transition. Salinas and Watsonville strawberry production continues to decline while Santa Maria slowly improves. Blueberries are moving away from Pacific Northwest production and more toward imports from Peru and Mexico, while raspberries remain in better shape. Strawberries are still the main item to watch, with elevated markets and tighter supplies expected to continue.

As we head into September, there is still plenty of product moving through the system, but we are starting to lose some of the cushion we had earlier in the summer. School demand is back, Salinas growers are fighting for harvestable yields, small citrus remains tight, and berries are moving between growing regions. Nothing unusual for this time of year, but definitely a few more reasons to stay close to the market over the next several weeks.

