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The Source

Commodity of the Month - Romaine

MARKET ALERTS

Asparagus: Mexico asparagus remains very tight, while Peru's northern production is expected to improve supplies in early December.

Avocados: Avocado supplies are slowly improving, with light harvests and peak sizing on 48s and 60s.

Bell Peppers: East Coast quality is declining, while West Coast supplies are improving. Markets are expected to firm.

Cantaloupe: Domestic cantaloupes are ending, with limited supplies and elevated prices expected until offshore volume improves.

Cauliflower: Cauliflower supplies remain tight, with firm markets expected until Yuma production increases.

Celery: Celery supplies and quality remain strong, with stable markets and good promotional opportunities.

Mushroom: New duties are expected to raise prices, though markets should improve as demand eases and supplies recover.

Pineapple: Pineapple supplies remain tight through year end due to weather, with limited open market availability and good overall quality.

Potatoes: Potato supplies continue to improve with good quality, though some sizes remain tight. Freight and limited sweet potatoes continue to impact the market.

Tomatoes: Roma supplies remain light, round tomatoes are extremely tight, and elevated markets are expected through December.

NOVEMBER 25, 2026

CROP UPDATES

As Thanksgiving approaches, produce markets continue to improve with stronger lettuce supplies, easing prices, improving broccoli and cauliflower, steady onions, tight strawberries, and limited potato sizes due to lower yields and freight challenges. Happy Thanksgiving!
Read more

WEATHER

California: Warmer, drier weather is expected through the week, with light showers returning late Saturday into Sunday.

Florida: Heavy rain today, then cooler and drier through Saturday. Rain chances return Sunday into Monday.

Mexico: Central Mexico will see rain through Friday, with cooler temperatures and possible patchy frost from Saturday through Monday.

Arizona: Windy through Thursday with gusts up to 28 mph, then easing Friday. Dry and warming through the weekend, with frost still possible near Wenden early Thursday.

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
- Raspberries
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Commodity Updates

Apples

Finally, we have some strong volumes to work with. All varieties are well supplied in foodservice pack sizes, with only some tightening on Reds and Galas due to continued 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 northern supplies expected to increase in early December, though El Niño conditions, higher air freight costs, and limited ocean container availability remain concerns. Meanwhile, Mexico's asparagus market is extremely tight, with strong pricing and limited supplies as production declines in Baja and Sonora, while upcoming Central Mexico production 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

The avocado market is gradually improving, with both the Flora Loca and Aventajada crops now in production. Dry matter and oil content are in the mid-to-high 20% range, providing consistent ripening characteristics across both crops. Peak sizing remains on 48s and 60s. Harvest activity has resumed, though volumes are still very light, and it will likely take another week or so for supply to fully move through the pipeline.

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

Bell Peppers

ALERT

Florida and Georgia have good early-week volume, though Georgia is approaching the end of its season. Recent rain in Florida is leading to increased bruising and stem decay. In the West, Sonora remains in production, with Sinaloa coming online this week and supplies expected to improve through December. Markets are expected to firm as Florida quality declines and demand from Mexico increases.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Light	$$$	Fair
Mexico (November - May)	Light	$$$	Good

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

Supply Partners



Commodity Updates

Berries (Blackberries)

Production remains steady out of Mexico, and softer post-holiday demand is expected to put downward pressure on the market.

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

Berries (Blueberries)

Product remains available from CEMEX, Peru, and Argentina, though Peruvian volumes are expected to continue declining as the season approaches its end.

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)

Demand is expected to ease following the holiday, while supplies should improve as new production comes online in Florida and Baja over the next few weeks. The market is expected to stabilize late next week as demand and pricing begin to moderate from recent highs.

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

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

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



Commodity Updates

Broccoli

Broccoli supplies have improved significantly as production increases and harvest volumes recover. While Diamondback Moth pressure continues to impact some fields, overall availability is better. Market pricing is expected to remain firm due to steady 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 remains strong, and market conditions are expected to tighten, leading to a modest increase in pricing 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 continuing as the primary growing region. Production will gradually transition to Bakersfield next month, while sizing and availability remain strong 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 continues to strengthen as the Salinas season winds down. Reduced harvest volumes, increasing winter demand, and the delayed start of Yuma production are creating supply pressure. With only a few weeks of Salinas production remaining, markets are expected to remain firm and trend higher until Yuma comes online.

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 strengthening earlier this month, and pricing is expected to remain steady through Thanksgiving. Santa Maria and Salinas continue to offer good availability across all sizes, with strong quality reported throughout the region. Flexible shipper offerings are also creating attractive promotional opportunities.

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

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

Supply Partners



Commodity Updates

Citrus (Grapefruit)

Star Ruby grapefruit are readily available, peaking on 48-count fruit, and are shipping 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 District 1 (San Joaquin Valley) increases production in the coming weeks. District 2 (Ventura County/Oxnard) continues to provide limited volumes, while District 3 (Arizona/California Desert) remains a key source of supply. Peak sizing continues on 140-count and larger fruit.

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

Citrus (Limes)

Mexico: Supplies are tightening due to excessive fall rainfall and fewer blooms in Veracruz. Smaller sizes (110s and 150s) remain limited, with prices expected to rise over the next two weeks.
Colombia: Production has rebounded, with strong volumes expected through December. Quality remains excellent, though higher Mexican markets are adding upward pressure to pricing.

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

Citrus (Oranges)

Navel season is in full swing, with peak sizing on 88-count and smaller fruit. Minimal degreening is currently needed to enhance color, and cooler nighttime temperatures should soon allow fruit to develop color naturally.

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

Cucumber

Georgia production has largely wrapped up, while rain and cooler temperatures in Florida continue to limit #1 retail-sized availability. In the West, Hermosillo and Culiacán are producing excellent quality and volume, with Los Mochis expected to begin in mid-December. Western markets should remain stable, while Florida retail-grade supplies stay tight.

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

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

Supply Partners Sunkist FRESH LINK



Commodity Updates

Eggplant

Georgia is nearing the end of its season, while Florida continues harvesting with generally good quality despite recent rain. In the West, Sonora and Sinaloa have strong, promotable supplies that are expected to remain available through year-end and into winter. East Coast markets may tighten due to weather-related losses.

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

Garlic

The 2026 California crop continues to ship as expected, with harvest projected to run through late September. Quality remains strong, and supplies are meeting current demand.

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 winds down, with most domestic green grapes expected to finish this week. Domestic red seedless grapes should remain a good value through mid-December. Imported grapes are now arriving on both coasts, with heavier volume in the East where lower freight costs are helping keep imported green grapes competitively priced.

Grapes (Green)

Commodity/Region	Supply	Price	Quality
	Steady	$$$	Good

Grapes (Red)

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

Green Onions

Green onion supplies out of Mexico remain strong, and the market is expected to stay mostly steady through next week.

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

Kale

Kale supplies and quality remain strong, with market conditions expected to stay steady through 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

Lettuce supplies remain very light in both Salinas and Santa Maria due to lower yields and ongoing INSV pressure. While Huron is beginning to add some volume, overall availability remains limited and industry-wide shortages continue to challenge order fulfillment. Quality issues, including discoloration, misshapen heads, and occasional insect damage, persist. Markets are expected to remain elevated as tight supplies and strong 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 has improved in both Salinas and Southern California. However, supplies remain below expectations, with demand continuing to outpace production and keep availability tight. Romaine hearts are moderately available, but ongoing supply constraints are supporting strong markets, with pricing expected to remain firm.

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 on tender leaf products, while other row crops continue to face tighter supply conditions.

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 supplies are expected to finish within the next few days. We recommend transitioning contracts to offshore or Mexican programs as supply shifts. Availability remains limited, with fruit peaking on 9-counts, and elevated pricing is expected to continue until offshore inventories increase.

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



Commodity Updates

Melon (Honeydew)

Domestic honeydews are still shipping out of Yuma, Arizona, though the season is nearing its end. Nogales honeydew supplies are increasing and are expected to become more readily available later this month.

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

Melon (Watermelon)

Watermelon demand is increasing while supplies remain stable. Nogales crossings are underway, with growers closely monitoring weather conditions and any potential impacts on availability.

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

Mushroom

ALERT

New government duties are expected to keep prices elevated as demand exceeds supply. Conditions should improve as post-holiday demand subsides.

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

Onions

Storage onion season is in full swing, with demand returning to normal post-Thanksgiving levels. Supplies continue to improve across the Northwest, supported by strong storage yields. Freight remains the primary market driver, while ample availability is helping keep pricing in check.

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

The pear market remains tight, as this season's crop is producing predominantly larger fruit, limiting availability of 100-count and smaller sizes. As a result, FOB pricing on smaller pears is expected to remain elevated with little near-term relief.

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

Weather-related challenges have reduced pineapple harvests, tightening supplies through year-end. Contract orders should remain unaffected, but open-market availability will be limited. Quality remains good, though crownless 8s, 10s, and organic pineapples remain tight. Crowned 6s and 7s are improving, while 8s remain steady. Some port delays are possible around Thanksgiving.

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

Potatoes

ALERT

Potatoes have fully transitioned into storage, with demand easing after Thanksgiving and supplies continuing to improve. Quality remains strong, with good availability on mid-size potatoes, while larger and smaller counts remain somewhat tight. Freight continues to influence the market. Color potatoes are readily available, while sweet potato supplies from California and North Carolina remain limited, and Mississippi production is starting slower than normal.

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

Squash

Florida zucchini supplies are improving, while yellow squash remains limited and elevated in price as Georgia nears season-end. Western supplies from Hermosillo and Guamúchil remain strong, with zucchini and grey squash readily available.

Commodity/Region	Supply	Price	Quality
Mexico (November - May)	High	$$$	Good
Florida (November - May)	Light	$$$	Good

Stone Fruit

Imported peaches are expected to arrive in early December, followed by nectarines 1 to 2 weeks later and plums after the New Year. In the meantime, kiwi, Asian pears, pomegranates, and persimmons remain readily available and offer great seasonal variety for winter menus.

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

Tomatoes

ALERT

Roma production in Florida remains light, with quality concerns limiting supplies, though volumes are expected to improve in mid-December. Grape tomato supplies are steady, while round tomatoes remain extremely tight due to weather-related losses and delayed Mexican production. Elevated markets are expected to continue through December, with meaningful relief unlikely until 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



Weather Updates



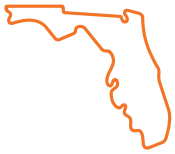
CALIFORNIA

After some overnight rain, warmer and drier conditions are expected through the end of the week, with highs in the mid-60s to mid-70s and cool mornings. Another system is forecast to arrive late Saturday night, bringing light to moderate showers through Sunday with up to ½ inch of rainfall possible.



MEXICO

Showers and thunderstorms are expected to increase across Central Mexico Thursday evening into Friday, with rainfall totals ranging from 1 to 3 inches. Rain chances will gradually diminish by Saturday, except across south-central Mexico where scattered showers are likely to persist. Temperatures will trend cooler through the weekend, with patchy frost possible from Saturday through Monday mornings. Overnight lows are expected to fall into the mid-30s to low 40s by the weekend, while daytime highs will range from the 50s to low 70s.



FLORIDA

Heavy rainfall across parts of the Florida Peninsula today will give way to cooler, drier conditions through Saturday. Rain chances increase again Sunday into Monday, accompanied by warmer temperatures. Winds are expected to gust 20 to 25 mph on Thursday before becoming lighter and more variable through the weekend.



ARIZONA

North winds will strengthen across Yuma through Thursday, with gusts reaching 25 to 28 mph before easing on Friday. Dry conditions are expected to persist through the weekend under high pressure. Temperatures will gradually warm into the upper 70s and low 80s through Saturday, with cooler mornings giving way to upper 40s and 50s by the weekend. Frost remains possible in colder areas near Wenden through Thursday morning.

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

	11/09/26	11/16/26	11/23/26	Change from 2 year ago	Change from year ago	Change from week ago
U.S.	6.127	5.937	5.695	↑ 2.156	↑ 1.864	↓ -0.242
East Coast (PADD1)	5.920	5.782	5.619	↑ 2.026	↑ 1.757	↓ -0.163
New England (PADD1A)	6.349	6.225	6.064	↑ 2.288	↑ 2.007	↓ -0.161
Central Atlantic (PADD1B)	6.412	6.309	6.146	↑ 2.359	↑ 2.136	↓ -0.163
Lower Atlantic (PADD1C)	5.694	5.541	5.378	↑ 1.875	↑ 1.589	↓ -0.163
Midwest (PADD2)	6.201	5.967	5.671	↑ 2.140	↑ 1.821	↓ -0.296
Gulf Coast (PADD3)	5.741	5.547	5.294	↑ 2.091	↑ 1.835	↓ -0.253
Rocky Mountain (PADD4)	6.206	6.011	5.772	↑ 2.322	↑ 2.049	↓ -0.239
West Coast (PADD5)	7.110	6.948	6.709	↑ 2.532	↑ 2.195	↓ -0.239
West Coast less California	6.429	6.269	6.079	↑ 2.324	↑ 1.971	↓ -0.190
California	7.897	7.733	7.436	↑ 2.774	↑ 2.453	↓ -0.297

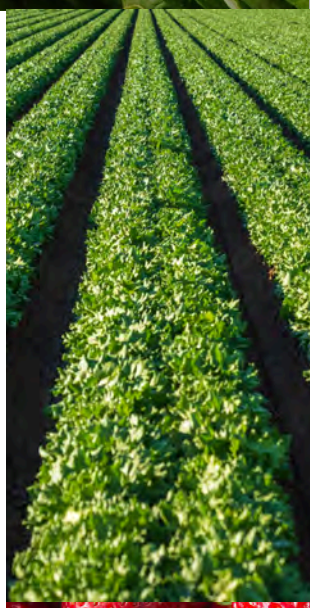
prices include all taxes

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



Crop Updates

A Welcome Exhale



As we head into Thanksgiving, I'm reminded of how fortunate we are to work in an industry built on relationships. From growers and harvest crews to truck drivers, warehouse teams, customers, and suppliers, there are a lot of good people behind every load that moves across the country. Fresh produce has a way of bringing people together, and we're thankful to play a small part in helping deliver healthy food to tables across the country.

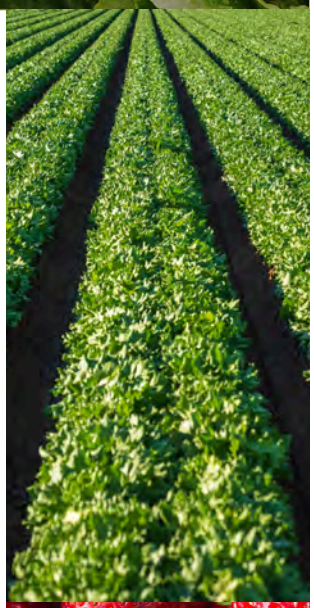


From a market standpoint, there's plenty to be thankful for as well. The transition to Yuma is largely behind us, supplies continue to improve across the lettuce category, and many of the pressures that defined the past month are beginning to fade. Demand has naturally eased following the Thanksgiving pull, while ideal growing conditions in the desert have allowed supplies of iceberg, romaine, and green leaf to build. Quality remains good overall and markets continue to trend lower, giving us a much smoother supply picture than we faced just a few weeks ago. In fact, lettuce pricing is running at roughly a quarter of last year's levels, a welcome change from the volatility we've experienced throughout much of the fall.



The cooking vegetables continue to lag behind the leafy greens, but there are finally signs of improvement. Cauliflower remains elevated and supplies are still tighter than we'd like, but availability has improved compared to recent weeks. Broccoli is following a similar pattern as additional desert acreage comes online. While neither market is completely out of the woods, the outlook today is considerably better than it was during the height of the transition.

Crop Updates



Strawberries remain one of the more challenging categories. Florida production is underway, but recent heavy rains have limited harvests and slowed what many hoped would be a quicker ramp-up. Supplies from Baja and Central Mexico also remain below normal following earlier weather disruptions. Markets have eased somewhat, but supplies remain snug and fill rates continue to be inconsistent. Additional Florida volume should gradually improve the situation as we move deeper into the season.



Potatoes are settling into what looks to be a long storage season. Harvest is complete, and yields finished well below last year's crop. The Thanksgiving pull has passed, allowing some relief on smaller sizes, but 40-70 count potatoes remain limited, with most shippers continuing to peak on 80 count cartons. Freight out of the Northwest remains expensive and difficult to secure, adding pressure to landed costs and keeping the overall market firm. While availability should improve compared to the holiday rush, transportation will remain a major factor in pricing and service levels through the remainder of the quarter.

Meanwhile, onions continue to be one of the more promotable categories in produce. Supplies are plentiful, quality is excellent, and markets remain favorable heading into December.



As we gather around the Thanksgiving table this week, we're grateful for the people who make this business so rewarding. We're also fortunate to work in an industry where increased consumption is a good thing. More fruits and vegetables on more plates is a win for everyone. Looking ahead, lettuce markets have found their footing in Yuma, cauliflower is beginning to show signs of improvement, and strawberry supplies remain the category most likely to test buyers as we head into the final month of the year.