CAPITOL CITY PRODUCE®

The Source

Commodity of the Month - Romaine

MARKET ALERTS

Asparagus: Asparagus supplies remain tight due to weather challenges, with limited availability and firm markets expected into December.

Avocados: Avocado markets are rising due to Michoacán disruptions, with 48- and 60-counts remaining the peak sizes.

Bell Peppers: Bell pepper supplies remain light during regional transitions, with improved volume expected as Coachella, Georgia, and Nogales production increases.

Brussels sprout: Brussels sprout supplies remain tight due to insect pressure, with pricing expected to strengthen as demand increases.

Cauliflower: Cauliflower supplies are tightening as the Salinas season ends, with markets expected to remain firm until Yuma production begins.

Citrus (Oranges): Valencia season is ending as the industry transitions to Navel oranges, with 113- and 138-count fruit peaking.

Lettuce (Iceberg): Iceberg lettuce supplies remain very limited due to low yields and disease pressure, keeping markets elevated as demand exceeds supply.

Lettuce Leaf: Romaine supplies remain tight as demand exceeds harvest volumes, keeping markets firm despite improving quality.

Pineapple: Pineapple supplies remain tight due to weather and El Niño, with limited open-market availability and elevated prices through November.

Potatoes: Potato supplies remain steady, though 40–80 count sizes and sweet potatoes are tight, while Washington quality remains strong.

Tomatoes: Tomato supplies remain tight across all varieties, with limited availability keeping markets elevated until production improves.

Strawberries: Strawberry supplies remain very limited as seasonal transitions and weather delays keep demand above available volume.

NOVEMBER 4, 2026

CROP UPDATES

Lettuce supplies are beginning to improve as Huron, Oxnard, and early Yuma volume ease pressure, though full recovery is still a few weeks away. Strawberries remain extremely tight due to weather impacts and limited California, Mexico, and Baja production. Melons are transitioning from domestic desert supplies to Mexico and imports, keeping markets firm. Avocado markets remain elevated as Michoacán disruptions continue to tighten supply.

Read more

WEATHER

California: High pressure brings warmer conditions this week, with highs reaching the mid-70s to mid-80s by Saturday.

Mexico: Light showers are possible this weekend as temperatures cool slightly, with highs dropping into the upper 60s to 70s early next week.

Florida: A cold front brings light rain Wednesday before cooler, drier conditions arrive, with temperatures easing through the weekend.

Arizona: Dry conditions continue with stronger winds late week, including 25–30 mph gusts in Yuma County, while temperatures warm into the 80s by Sunday.

FREIGHT

Freight this week continues to see shipper delays and out of route pickups as the produce industry reaches far and wide to fill the supply chain. We are still a bit too early to gauge the demand for transportation in the Yuma area, but that should show soon.

PRO FRESH LOGISTICS

IN PEAK SEASON

- Apples
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Apples

Supplies improved across all apple varieties this week, though Pink Lady remains the tightest. Even so, Pink Lady volume increased compared to last week. The crop continues to favor larger fruit, keeping foodservice sizes limited. Overall availability is stable, but the lighter crop and shortage of smaller sizes are expected to keep prices above last year's levels.

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

Asparagus

ALERT

Mexican asparagus supplies remain tight, with larger sizes limited and markets strengthening ahead of Thanksgiving. Baja and Peru continue to face weather-related production challenges, while additional regions are being explored to support supplies until Caborca production ramps up in January.

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 are rising due to protests in Michoacán, while both the Flora Loca and Adventajada crops remain in production. Dry matter and oil content are in the mid-to-high 20% range, providing consistent ripening, with 48- and 60-counts continuing as the peak sizes. We will continue to monitor market conditions and provide updates as they develop.

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

Bell Peppers

ALERT

Green bell supplies remain light as production transitions from Northern California to Coachella, where harvest is just beginning. Georgia has also started harvest with limited early volume, and Nogales supplies are expected to begin arriving by mid-to-late November. Meanwhile, colored bell production is winding down in Eastern Canada, while Western Canada and Central Mexico continue to provide steady volume and good quality, with Western Canadian supplies expected to last through November, weather permitting.

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

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

Supply Partners Rainier Fruit Company, Dole, Fresh Link, Mission

Commodity Updates

Berries (Blackberries)

Central Mexico and Baja production is increasing as growing regions recover from the weather-related issues that impacted supplies over the past several weeks.

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

Berries (Blueberries)

Conventional supplies from Central Mexico and Peru remain steady, while organic availability continues to be very limited, with demand exceeding supply.

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

Berries (Raspberries)

Similar to blackberries, production is expected to increase through November, bringing improved availability and lower market prices.

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

Berries (Strawberries)

ALERT

Santa Maria harvests continue to decline as the season winds down, while Oxnard production remains light as fields recover from recent weather and fruit develops color. Central Mexico and Baja are also off to a slow start due to El Niño-related rain, leaving supplies extremely limited and demand exceeding availability across all growing regions.

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 have improved as production and harvest volumes continue to recover. While Diamondback Moth pressure persists in some fields, overall availability is better. Despite the improved supply, markets 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

ALERT

Brussels sprout supplies remain tight due to ongoing insect pressure impacting yields and availability. As demand increases, markets are expected to strengthen, with prices trending modestly higher.

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 begin transitioning to Bakersfield next month, while sizing and availability remain good 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, lower-than-expected production, and the upcoming transition to Yuma are keeping supplies tight, while seasonal demand continues to increase as buyers return to winter growing regions. With several shippers expected to finish Salinas production in the coming weeks and Yuma not yet underway, markets are expected to remain firm and could continue to rise until new desert supplies become available.

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

Celery

Celery markets have stabilized after strengthening earlier this month 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 favorable promotional opportunities.

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

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

Supply Partners

PRO*ACT
CONNECTING FARMS | EMPOWERING KITCHENS™

Commodity Updates

Citrus (Grapefruit)

Star Ruby grapefruit are available, with peak sizing on 48-counts, 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 as supplies continue to improve with increased production from District 1 (San Joaquin Valley). District 2 (Ventura County/Oxnard) remains limited, while District 3 (Arizona/California Desert) continues to provide 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)

Lime markets are rising as wet weather in Veracruz, Mexico, slows harvesting. Supplies are primarily 175- to 230-count, with 250-count limited. Minor blanching and oil spotting are being reported, but overall quality remains good. Markets are expected to stay elevated into next week before easing in the coming weeks.

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

Citrus (Oranges)

ALERT

Valencia season is wrapping up as Navel production continues to increase. Early harvest is peaking on 113- and 138-count fruit, with all shippers expected to transition fully to Navels during the week of October 26.

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

Cucumber

Eastern supplies are transitioning from North Carolina to Georgia as the season winds down. Baja volume remains light, while Sonora production continues to increase. Improved weather is expected to support better volume and quality in the coming 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 is at peak production, providing promotable volumes and strong quality over the next two weeks before supplies begin to gradually decline. In the West, supplies remain light, though mainland Mexico is expected to increase production next week, which should help ease market conditions.

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 continue through late September. Quality remains strong, and availability is meeting expectations.

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 grape supplies continue to tighten as the season winds down, though overall availability remains good. Green grapes are seeing stronger demand due to retail promotions, while red seedless continue to offer good value. Imported grapes have begun arriving in New Jersey, helping keep imported greens competitive with domestic fruit due to lower freight costs.

Grapes (Green)

Commodity/Region	Supply	Price	Quality
	Steady	$$$	Good

Grapes (Red)

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

Green Onions

ALERT

Green onion supplies from Mexico continue to improve, and markets are expected to remain mostly steady into next week.

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

Kale

Kale supplies and quality remain mostly good, with conditions expected to stay steady 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 Dole, Mann's, Field Fresh, Coastal Fresh, Queen Victoria, Fresh Link

Commodity Updates

Lettuce Iceberg

ALERT

Iceberg lettuce supplies remain extremely light in Salinas and Santa Maria due to lower yields and ongoing INSV disease pressure. Huron is beginning to add production, but overall availability remains limited as demand continues to exceed supply. Quality concerns, including outer-leaf discoloration, misshapen heads, and occasional insect damage, persist, with carton weights ranging from 22–26 lbs. Markets are expected to remain elevated as tight supplies and strong demand continue.

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

Lettuce Leaf

ALERT

Romaine disease pressure remains light, and green and red leaf quality continues to improve in the Salinas Valley and Southern California. However, supplies remain below budget, with demand exceeding harvest volumes and keeping availability tight. Romaine hearts are moderately available, but continued supply constraints have pushed markets into the mid-$70s, with prices expected to remain firm.

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

Lettuce Tender Leaf

Tender leaf supplies and quality remain strong, providing good promotional opportunities even as other row crop supplies continue to stay tight.

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

Melon (Cantaloupe)

Domestic cantaloupes continue shipping from Central California as the Westside season winds down, with 9-count fruit remaining the peak size. Cooler weather and lower yields are pushing markets higher. Yuma production is beginning but will be limited by virus pressure, while offshore supplies are expected to arrive in late November.

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

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

Supply Partners

Commodity Updates

Melon (Honeydew)

Domestic honeydews continue shipping from Central California as the Westside season winds down, with 5-count fruit remaining the peak size. Cooler weather and lower yields are pushing markets higher. Nogales supplies are expected later this month, with offshore production arriving by the end of November.

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

Melon (Watermelon)

Watermelon demand and supplies are both declining as cooler weather slows movement across growing regions. Nogales crossings have begun in limited volume, with better availability expected in the coming weeks.

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

Mushroom

Due to new government duties, markets are expected to strengthen as supplies remain limited and demand continues to exceed availability.

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

Onions

Storage onion harvest is in full swing, with improved yields and steady supplies across the region. Markets remain firm due to strong demand, regional production ending sooner than expected, and continued freight costs.

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 continues to favor larger sizes, with limited availability of 100-count and smaller fruit. Tight supplies of foodservice sizes are expected to keep FOB pricing firm in the coming weeks.

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

Pineapple supplies remain tight due to ongoing weather challenges and El Niño, with limited availability expected through the end of November. Contract orders remain stable, but open-market supplies are limited, keeping prices elevated. Crownless and organic pineapples remain the tightest, while overall quality is good.

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

Potatoes

ALERT

New crop potatoes are in storage, with 40- to 80-count sizes remaining in high demand and expected to stay tight throughout the season, requiring additional lead time. Washington potatoes continue to offer excellent quality, peaking on mid-size counts, while larger and smaller sizes remain limited. Color potatoes are readily available, but sweet potato supplies from California and North Carolina remain tight, with Mississippi production off to a slow start.

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

Squash

Squash supplies continue to improve as Georgia, Florida, and Sonora increase production, easing markets and providing good quality. On the West Coast, Central Coast production is winding down and expected to finish by mid-November, though supplies remain adequate. Markets are expected to soften further as Mexican volume continues to increase.

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

Stone Fruit

The domestic stone fruit season has ended, with imported peaches expected to arrive in early December, followed by nectarines 2–3 weeks later and plums after the new year. Meanwhile, domestic kiwi, Asian pears, pomegranates, and persimmons remain readily available, providing great seasonal options.

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

Tomatoes

ALERT

Tomato supplies remain tight across all varieties. Round tomatoes are extremely limited, while Roma and grape tomatoes continue to face supply constraints due to seasonal transitions and weather-related production delays. Markets are expected to remain elevated until new production improves in November.

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

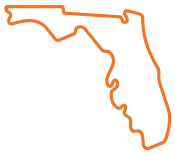
Weather Updates

CALIFORNIA

High pressure returns to the region this week, bringing a warming trend through the weekend. Coastal morning lows will remain in the upper 40s to mid-50s, while inland areas south of King City will cool into the mid-30s to mid-40s. Daytime highs will warm from the mid-60s to mid-70s on Wednesday into the mid-70s to mid-80s by Saturday.

MEXICO

Shower chances increase this weekend as a frontal boundary moves into the region, though rainfall is expected to remain light, with most areas receiving 0.05–0.20 inches. Temperatures will cool slightly, with highs in the 70s to low 80s through Saturday before dropping into the upper 60s to upper 70s early next week. Overnight lows will remain in the upper 40s to mid-50s.



FLORIDA

A cold front will bring light showers on Wednesday, with most areas expected to receive less than 0.10 inches of rain before cooler, drier conditions arrive later in the week. Winds will remain light, with gusts generally below 15 mph. Highs will stay in the low to mid-80s through Saturday before cooling into the mid to upper 70s across North Florida on Sunday, while Central and South Florida remain in the low 80s. Overnight lows will range from the mid-50s to low 70s through the weekend.

ARIZONA

Dry conditions will continue as high pressure builds this weekend, with increasing northerly winds developing late in the week. Yuma County can expect gusts of 25–30 mph late Friday into Saturday, especially along the lower Colorado River. Temperatures will gradually warm, with highs reaching the mid-70s to low 80s across central Arizona and the low to mid-80s in Yuma County and southeast California by Sunday. Morning lows in Yuma County will remain in the low- to upper-50s.

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

Freight Updates

Freight this week continues to see shipper delays and out of route pickups as the produce industry reaches far and wide to fill the supply chain. We are still a bit too early to gauge the demand for transportation in the Yuma area, but that should show soon.

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

	10/19/26	10/26/26	11/02/26	Change from 2 year ago	Change from year ago	Change from week ago
U.S.	6.276	6.352	6.292	↑ 2.756	↑ 2.539	↓ -0.060
East Coast (PADD1)	5.984	6.079	6.025	↑ 2.435	↑ 2.271	↓ -0.054
New England (PADD1A)	6.470	6.421	6.416	↑ 2.663	↑ 2.480	↓ -0.005
Central Atlantic (PADD1B)	6.508	6.496	6.486	↑ 2.694	↑ 2.578	↓ -0.010
Lower Atlantic (PADD1C)	5.740	5.890	5.814	↑ 2.314	↑ 2.136	↓ -0.076
Midwest (PADD2)	6.352	6.480	6.402	↑ 2.885	↑ 2.629	↓ -0.078
Gulf Coast (PADD3)	5.903	5.951	5.912	↑ 2.728	↑ 2.538	↓ -0.039
Rocky Mountain (PADD4)	6.422	6.521	6.445	↑ 2.862	↑ 2.769	↓ -0.076
West Coast (PADD5)	7.394	7.329	7.272	↑ 3.082	↑ 2.773	↓ -0.057
West Coast less California	6.659	6.614	6.575	↑ 2.812	↑ 2.454	↓ -0.039
California	8.242	8.155	8.076	↑ 3.395	↑ 3.143	↓ -0.079

prices include all taxes

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

Crop Updates

A Little Breathing Room

We are right in the heart of transition.

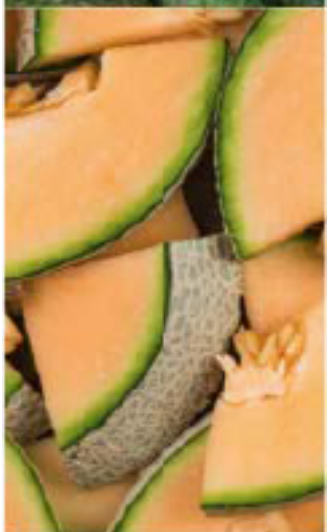
Huron, Oxnard, and early Yuma volume are finally starting to take some pressure off Salinas and Santa Maria, but we are still a couple of weeks away from having the full desert program's volume behind us. Major processors are expected to have their salad plants fully fired up around November 16, which should bring a more meaningful increase in volume and consistency. For now, iceberg and romaine markets are easing, green leaf is still tight, and we are starting to see the first signs that the worst of the row-crop squeeze is behind us.

Strawberries are unfortunately moving in the opposite direction. California continues to struggle after the recent stretch of heat followed by rain. Cull rates have been running as high as 50% in some areas, and much of the fruit being harvested simply does not have the shelf life needed for longer transit.

Santa Maria is nearing the end of its season, with very little fruit making it into the fresh market. Oxnard is still cleaning up after the weather and waiting for the next flush of undamaged fruit to color.

Normally, Central Mexico and Baja would be starting to take some pressure off California by now, but those regions have also been slowed by rain and delayed production. Some Mexican volume is beginning to move through Texas, but supplies remain limited.

That keeps strawberries firmly in a demand-exceeds-supply situation, with very little open-market fruit available and shippers focused heavily on contracts and existing commitments.



Crop Updates

Melons are also moving through a seasonal handoff.
Arizona cantaloupe production is underway, but yields are running below the summer California deal. Recent rain around Yuma slowed harvests, and the crop is concentrated mainly in 9- and 12-count fruit, with jumbo sizes especially limited.

The Arizona season will begin winding down over the next few weeks just as Mexico and Central American imports start coming into play. Honeydew supplies are in a better position, with steady availability today and Mexican production gradually increasing.

The bigger story with melons is timing. We are working through the final domestic desert supplies while waiting for Mexico and imports to carry more of the load, which should keep cantaloupe markets firm through the rest of November.

Avocados remain the market to watch most closely.
Harvesting in Michoacán is still largely suspended, and there is still no clear indication of when normal operations will resume. Jalisco continues harvesting, but its volume is not enough to replace what the U.S. normally receives from Michoacán.

The cushion we had a week ago is also getting smaller. U.S. avocado inventories have fallen about 15%, from 49.9 million pounds to 42.4 million pounds, with the entire decline coming from Mexican-origin fruit.
That does not mean the market is out of avocados today, but the pipeline is clearly getting tighter.

Crop Updates

Even when normal harvesting resumes, there will be a delay before that fruit reaches customers. It still has to be harvested, packed, inspected, transported, and in many cases conditioned before it is ready to ship.

For now, pricing is expected to remain elevated while the industry works through the interruption and rebuilds inventory.

This week brings some much-needed relief on lettuce, but the market is still far from quiet. Strawberries remain extremely tight, melons are working through their seasonal handoff, and every additional day of disruption in Michoacán keeps pressure on the avocado market.