

The Source

Commodity of the Month - Tender Leaf

MARKET ALERTS

Asparagus: Asparagus supplies remain tight, with strong demand and reduced production keeping prices elevated. The market is expected to remain firm.

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

Citrus (Oranges): California Valencia oranges are heavy to larger sizes, while small sizes remain extremely tight through season-end. Size flexibility will be important.

Onions: Onion supplies remain tight due to lower yields, keeping prices elevated. Freight is driving the market, with new Pacific Northwest supplies expected to ease conditions. Washington storage onions are available.

Pineapple: Pineapple supplies will tighten through early November, with open-market availability limited. Organic and crownless sizes remain especially tight.

Potatoes: Large potatoes are tightening due to lower pack-outs and storage issues. Washington quality is good, but large and small sizes remain snug. Florida colored potatoes have 1–2 weeks remaining, while yellow potatoes and NC sweet potatoes remain tight.

Strawberries: Strawberry supplies remain extremely tight, with limited open-market availability expected through August. Production should improve next week, with Baja and Central Mexico starting in September.

AUGUST 19, 2026

CROP UPDATES

Salinas lettuce and leafy green demand is increasing as schools and foodservice ramp up, while heat, disease, and insect pressure are tightening usable yields. Supplies remain adequate for now, but markets are beginning to strengthen, particularly for iceberg, romaine, and green leaf. [Read more](#)

WEATHER

California: Warm, slightly above-normal temperatures will continue through the weekend, with increased humidity. Another warming trend is expected beginning August 26.

Florida: Florida will remain warm and humid, with scattered storms and highs in the 90s through next week.

Mexico: Sinaloa will remain hot through early September, with highs of 94°–104° and isolated showers and thunderstorms possible.

Arizona: Arizona will remain hot and humid, with afternoon storms possible. Phoenix and Tucson will be hottest, with Phoenix reaching 106°–111° through the weekend.

FREIGHT

Freight this week continues to be steady from the western growing regions with good truck availability. Expect good capacity in FL, TX and ID for the foreseeable next few weeks.



IN PEAK SEASON

- Carrots
- Grapes
- 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 higher prices, while Gala and Honeycrisp remain the bright spots. New-crop harvest is underway, and the Gala market remains stable.

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



Asparagus

ALERT

Asparagus supply remains tight, with steady demand keeping prices elevated. Mexico continues to face quality and availability issues, while Peru is also seeing reduced production and strong global demand. With container arrivals down 10% this week and additional weather and supply concerns ahead, the market is expected to remain firm.

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 are slightly higher on 60ct and 70ct due to a shift toward 48ct, which remains steady to slightly lower. California and Peru are also shipping, but both are winding down.

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



Bell Peppers

California markets remain soft, with steady production and light demand, while lower East Coast pricing continues to add pressure. East Coast supplies are currently strong, but recent heavy rains and heat are expected to impact quality and yields moving forward.

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)

Blackberries remain unchanged from last week, with steady supplies from California, Mexico, and Oregon. Demand also remains steady.

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

The PNW and Michigan are nearing the end of production, with September marking the close of most U.S. production. Peruvian and Mexican supplies are expected to take over the market in September.

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

Supplies are coming primarily from Baja and Mexico, with California also contributing light volume.

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 tight as newer fields come online and production transitions to younger fields. The market is expected 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 steady with good overall quality. With demand beginning to pick up, the market is expected to increase slightly.

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



Carrots

Bakersfield is currently the primary growing region, with good sizing and strong availability across all carrot 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

Cauliflower supplies are strong across all growing regions this week, and the market is expected 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 remains steady in both the North and South, with the best deals coming from the Santa Maria/Oxnard region. All sizes are available, with slightly stronger availability on larger sizes. Light seeder and insect damage has been reported but remains minimal. Supplies are expected to stay steady throughout the week.

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 readily available, peaking at 48ct, 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)

ALERT

The lemon market remains elevated due to limited availability and strong demand. Supplies are expected to stay tight, keeping prices firm in the near term. Offshore fruit is becoming 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
Oxnard/Ventura (February - September)	Steady	\$\$\$	Fair
San Joaquin Valley (October - May)	Light	\$\$\$	Good



Citrus (Limes)

Lime crossings remain steady, with supply expected to hold for the next three weeks before tightening. Weather continues to impact U.S. No. 1 yields, while declining Mexican production will be supplemented by Colombian imports. Peru's new season is expected to begin in September/October.

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



Citrus (Oranges)

ALERT

California Valencia oranges are heavily skewed toward larger sizes, with 56ct and 72ct leading production. Small sizes, particularly 113ct and 138ct, remain extremely limited and are expected to stay tight through the end of the season. Flexibility with size and grade will be important, with 88ct and 72ct substitutions likely needed to maintain order coverage.

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



Cucumber

Markets remain mostly steady, with ample promotional opportunities despite slightly lighter Baja production. New York volume is increasing this week with excellent quality, while local Midwest supplies continue to build.

Commodity/Region	Supply	Price	Quality
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

New Jersey production has increased, easing the market, while California remains stable with improving supplies. Promotable volume is expected across the East Coast and Midwest over the next several weeks.

Commodity/Region	Supply	Price	Quality
California (May - October)	Light	\$\$\$	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 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 remain strong overall, with the market expected to stay steady into next week, weather permitting.

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



Kale

Kale supplies and quality remain strong, with the market 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

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Commodity Updates



Lettuce Iceberg

Supplies are plentiful across both Northern and Southern California, with shippers flexing and encouraging promotions. Load volume is available, with good weights and sizing. With schools starting across the country, this is an excellent time to promote, and no offer is unreasonable. Strong production is expected to continue through at least this week.

Commodity/Region Supply Price Quality

Santa Maria, California (March-December)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Lettuce Leaf

Romaine, green leaf, and red leaf supplies are expected to remain strong throughout the week, with the best availability coming from the Salinas Valley. Most suppliers are reporting above-average weights and sizing, while romaine hearts should remain steady. Fringe and tip burn have been reported but remain minimal.

Commodity/Region Supply Price Quality

Salinas, California (May - October)	Steady	\$\$\$	Fair
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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 transitioning to new fields in California's Westside region, with product peaking on 9ct. Supplies are good, with promotional opportunities available on the new crop.

Commodity/Region Supply Price Quality

Central America (December - May)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Melon (Honeydew)

Domestic honeydews are transitioning to new fields in California's Westside region, with product peaking on 5ct. Supplies are good, with promotional opportunities available on the new crop.

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



Melon (Watermelon)

Demand for watermelons remains steady as we come off the holiday ADS. Watermelons are currently available in California, the Southeast, and Texas.

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



Mushroom

Due to new government duties, prices are expected to increase as demand continues to outpace supply.

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



Onions

ALERT

Onions will continue loading from Central California and New Mexico for the remainder of the summer onion season. Lower yields are impacting supplies and keeping prices elevated, a trend that is expected to continue until new supplies become available from the Pacific Northwest. Freight is currently a significant driver of the market. Winter storage onions are also available in Washington.

Commodity/Region	Supply	Price	Quality
Eastern Oregon/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 growers also beginning Starkrimson. The market remains mostly steady. 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 significantly by the end of August and remain limited through early November due to strong natural flowering and limited harvest-ready fruit. Contract orders should remain unaffected, but open-market availability will be tighter. 6- and 7-count crowned pineapples are increasing, while 8-count remains steady. Crownless 8- and 10-count, along with organic pineapples, remain very tight.

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



Potatoes

ALERT

Large-size potatoes are tightening as we move deeper into the season, with lower pack-outs and storage issues from the warm winter impacting overall supplies. Orders will require additional lead time to secure product. Washington potatoes are showing great quality, with mid-sizes most available while large and smaller counts remain snug. Florida colored potatoes are expected to be available for another 1-2 weeks. Yellow potatoes remain tight, while Reds are in better supply. North Carolina sweet potatoes will remain limited until new crop is available.

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



Squash

Zucchini and gray squash remain plentiful, while yellow squash continues to command premium pricing due to tighter supplies. New Jersey and New York have strong production with promotable volumes, though August heat may tighten Western supplies.

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



Stone Fruit

Peaches, plums, and nectarines are all in full production. Peach and nectarine sizing has improved significantly, with limited small fruit available. Small plums remain plentiful and attractively priced. The Chilean kiwi market has strengthened due to lighter supplies, with availability limited. Chile will remain the primary source until California production resumes in October.

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



Tomatoes

Tomato supplies remain generally adequate, with weather-related quality issues improving as Tennessee and other regional harvests expand. California and Baja continue to provide strong, consistent volume, while Virginia is producing good-quality grape tomatoes. Central Mexico and Baja are expected to increase production in the coming weeks, improving overall market availability.

Commodity/Region	Supply	Price	Quality
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 above-normal temperatures inland through Thursday, with highs ranging from the upper 60s–70s near the coast to the 90s–104° south of Soledad. Temperatures will cool slightly Friday, with increased humidity from monsoonal flow through the weekend. Warm, moderately humid conditions are expected into early next week, with another warming trend beginning August 26.



MEXICO

Over the growing areas of Sinaloa, temperatures will warm slightly through the latter half of the week, with daytime highs reaching 94°–104° from Thursday through Saturday and morning lows in the upper 70s to low 80s. Winds around Culiacán will remain light, with gusts near or below 15 mph through Thursday. Isolated showers are expected through August 22, with most rainfall amounts ranging from 0.05” to 0.30”, though higher totals are possible with some thunderstorms. Looking ahead, warm conditions are expected to continue into early September, with inland highs of 94°–104°, coastal highs in the upper 90s, and lows in the upper 70s to low 80s. Isolated showers and thunderstorms are possible through September 1.



FLORIDA

Warm, humid conditions will continue across Florida through the weekend, with isolated to scattered showers and thunderstorms over the next five days. Highs will reach the low to upper 90s through Friday, easing to the low to mid-90s over the weekend, with morning lows in the mid-70s to low 80s. Winds may gust near 15 mph through Friday. Warm temperatures and isolated to scattered storms are expected into next week, with highs in the upper 80s to mid-90s and lows in the 70s.



ARIZONA

Arizona will remain hot and generally humid this week, with afternoon thunderstorms possible on several days. Lower desert areas, including Phoenix and Tucson, will see the hottest temperatures, with Phoenix reaching 106°–111° through the weekend.

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



Freight Updates

Freight this week continues to be steady from the western growing regions with good truck availability. Expect good capacity in FL, TX and ID for the foreseeable next few weeks.



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

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

	08/03/26	08/10/26	08/17/26	Change from		
				2 year ago	year ago	week ago
U.S.	5.348	5.257	5.454	↑ 1.766	↑ 1.741	↑ 0.197
East Coast (PADD1)	5.299	5.193	5.340	↑ 1.583	↑ 1.607	↑ 0.147
New England (PADD1A)	5.549	5.514	5.545	↑ 1.526	↑ 1.576	↑ 0.031
Central Atlantic (PADD1B)	5.587	5.535	5.652	↑ 1.717	↑ 1.744	↑ 0.117
Lower Atlantic (PADD1C)	5.168	5.034	5.204	↑ 1.540	↑ 1.561	↑ 0.170
Midwest (PADD2)	5.262	5.181	5.435	↑ 1.761	↑ 1.733	↑ 0.254
Gulf Coast (PADD3)	5.141	5.044	5.237	↑ 1.882	↑ 1.897	↑ 0.193
Rocky Mountain (PADD4)	5.285	5.271	5.427	↑ 1.777	↑ 1.670	↑ 0.156
West Coast (PADD5)	6.130	6.033	6.203	↑ 1.909	↑ 1.748	↑ 0.170
West Coast less California	5.623	5.526	5.699	↑ 1.794	↑ 1.605	↑ 0.173
California	6.716	6.618	6.785	↑ 2.046	↑ 1.914	↑ 0.167

*prices include all taxes

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



Crop Updates

Demand Returns as Salinas Crop Pressure Builds

A beautiful overcast morning in the Salinas Valley is a welcome sight as we move through the second half of August. The cool marine layer and mild coastal temperatures are exactly what lettuce and leafy green crops need following periods of summer heat. One of the unique characteristics of the Salinas Valley is its many microclimates. Fields near the coast can remain cool and overcast while temperatures only 20-30 miles inland climb dramatically higher. These temperature swings will continue to play an important role in crop quality as summer production rolls on.

Another welcome change is demand. K-12 schools are largely back in session across the country and university business is beginning to ramp up, bringing some much-needed movement back into the market. Lettuce pricing has remained at relatively low levels through much of the summer with ample supplies and softer demand. We are now beginning to see that change. Iceberg markets have started to inch higher, while green leaf and romaine remain steady but are showing signs of upward movement as demand improves.

The timing is important because although overall supplies remain sufficient, usable yields are beginning to come under increasing pressure in the Salinas Valley. Long summer days, periods of heat and warm, humid nights have increased disease, insect and physiological pressure across current acreage. INSV, Sclerotinia, mildew and bottom rot are being reported in lettuce and romaine fields, while internal burn, tip burn and lighter case weights are also becoming more prevalent. Insect pressure from aphids, lygus and Diamondback moth continues to impact leafy greens and Cole crops, particularly broccoli.





Crop Updates

Tender leaf items such as spinach and spring mix also remain especially sensitive to these late-summer conditions. Faster growth, insect damage and disease pressure can weaken leaf texture and shorten shelf life, particularly in processed items. Maintaining the cold chain and keeping inventories turning quickly will remain critical as we move toward fall.

For now, there appears to be enough product available to meet demand across most major Salinas Valley commodities. There is concern as increasing school and foodservice demand meets gradually declining yields and late-season crop pressure. It may not take a dramatic increase in business to move markets from today's relatively low levels. We are already seeing the first signs of that movement in iceberg, romaine, and green leaf and watching others closely over the coming weeks.

Looking farther ahead, plantings are underway for the short Huron transition season, while groundwork continues in the Arizona and California desert regions for production beginning in November. Until then, the Salinas Valley will remain the primary source for many Western vegetables, making weather, disease pressure and improving demand increasingly important factors as we move through September and toward the fall transition.

