PRO*ACT
CONNECTING FARMS | EMPOWERING KITCHENS™

The Source

Commodity of the Month - Avocados

MARKET ALERTS

Bell Peppers: Bell pepper markets remain firm as Central Valley winds down, with Coachella and Nogales expected to improve supplies in the coming weeks.

Broccoli: Broccoli supplies are improving slightly but remain below normal due to Diamondback Moth pressure, keeping markets firm.

Brussels sprout: Brussels sprouts remain tight due to insect pressure, with strengthening demand expected to support higher pricing.

Citrus (Oranges): Valencias are wrapping up as new-crop Navels ramp up, with full transition expected the week of October 26.

Lettuce (Iceberg): Lettuce supplies remain tight due to INSV and lower yields, with Huron providing limited relief. Markets remain firm as demand stays strong.

Lettuce Leaf: Leaf conditions are improving, but supplies remain tight with strong demand keeping romaine markets elevated.

Pineapple: Extreme weather has tightened pineapple supplies, with limited availability and firm pricing expected through early November.

Potatoes: Potato supplies remain tight with limited sizing and strong demand, while sweet potato availability remains limited until new crop.

Tomatoes: Tomato markets remain firm due to limited supplies, tight larger sizes, and strong demand, with snacking tomatoes especially limited.

Strawberries: Strawberry supplies remain tight as Santa Maria declines and Oxnard recovers from heat, with rain expected to further limit availability and support higher markets.

OCTOBER 21, 2026

CROP UPDATES

Rain is impacting California growing regions after weeks of heat, adding pressure to already challenged crops. Lettuce supplies remain tight due to disease and lower yields, while berries are facing further constraints from slowed harvests and quality concerns. Mexico's weather issues continue to limit berry availability. The positive news is new-crop California Navels are ramping up, improving availability on smaller foodservice-friendly sizes and helping ease pricing. Read more

WEATHER

California: Cool, unsettled weather continues through Thursday with light rain, followed by a warming trend into the weekend.

Mexico: Light showers continue through the weekend, with mild temperatures before a slight cool down Sunday.

Florida: Steady temperatures continue, with dry conditions north and isolated showers possible in South Florida. Breezy winds continue through Friday.

Arizona: Rain and storms move in Wednesday–Thursday, with cooler temperatures and gusty winds before warming into the weekend.

FREIGHT

Freight this week will certainly be a turning point as transition is approaching full swing, and wet weather approaching the west is certain. Shipper delays are significant, and the need for making other pickups to fill orders is becoming normal.

PRO FRESH LOGISTICS

IN PEAK SEASON

- Apples
- Cauliflower
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- Celery
- Stone Fruit

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Commodity Updates

Apples

New-crop apples are now underway for most varieties, with Pink Lady production expected to begin on a limited basis later this week at select shippers. Sizing continues to run large across all varieties, creating tight supplies of foodservice-sized fruit. Overall, this is a lighter apple crop, and while the market remains manageable, prices for most varieties are expected to remain above last year's levels.

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

Asparagus

Mexican asparagus production remains steady across all sizes. Increased supply and softer demand have pushed prices lower, though the market is expected to tighten in the coming weeks. The transition between growing regions continues to limit production, keeping overall availability below normal with limited improvement expected across all sizes.

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

Avocados

Avocado markets remain steady, with both the Flora Loca and Adventajada crops currently in production. Dry matter and oil content are in the mid-to-high 20% range, resulting in similar ripening characteristics between the two crops. Peak sizing continues to be 48-counts and 60-counts. We will continue to monitor the market and provide updates if conditions change.

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

Bell Peppers

ALERT

Bell pepper markets continue to firm as Central Valley production winds down. Coachella is expected to begin in the next 10–14 days, while Nogales volume will gradually increase, with supplies expected to improve by late November. Red bell production is anticipated to ramp up in January. In the East, Georgia production is off to a slow start, with harvesting resuming today. Limited Canadian colored bell supplies are also contributing to higher California field-pack red bell prices.

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

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

Supply Partners



Commodity Updates

Berries (Blackberries)

Production in Central Mexico and Baja has been impacted by recent rainfall and high winds across the growing regions. Despite these weather challenges, supplies are still expected to steadily increase as we move into November.

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

Berries (Blueberries)

Conventional supplies from Central Mexico and Peru remain steady. 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, recent rainfall has disrupted harvesting in Central Mexico and Baja. Barring any additional weather impacts, production is expected to increase steadily in the coming weeks. Make the update more conciseUse a more market-focused tone

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

Berries (Strawberries)

ALERT

Santa Maria production continues to decline as the region moves later into its season, while Oxnard supplies remain light as fields recover from recent heat events. Forecasted rainfall on Wednesday and Thursday, with totals of 0.25 to 0.75 inches, is expected to further limit already tight supplies. As a result, markets have strengthened since last weekend, with prices moving into the low- to mid-teens as demand continues to outpace supply.

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

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

Supply Partners Driscoll's Only the Finest Berries™



Commodity Updates

Broccoli

ALERT

Broccoli supplies have improved slightly, though overall availability remains below normal. Ongoing Diamondback Moth pressure continues to affect younger fields, reducing yields and limiting production. While supplies are gradually improving, the market is expected to remain firm, with prices likely trending higher into next week. Six-week average pricing continues to be a key factor in market conditions.

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 as ongoing insect pressure continues to impact yields and overall availability. With demand beginning to increase, market conditions are expected to strengthen, resulting in 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 serving as the primary growing region. Production will gradually transition to Bakersfield next month. Sizing and availability are good 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 have improved as additional fields come into production, allowing for increased harvesting and better overall availability. While some suppliers may continue to experience occasional gaps into next week, the market is becoming more balanced. Diamondback Moth pressure remains a concern, particularly in South County and Santa Maria, where yields continue to be affected. Improved production is supporting promotional volume and helping keep market pricing steady.

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 celery market is steady to start the week, and conditions are expected to remain consistent. Santa Maria and Salinas continue to offer good availability across all sizes, with shippers maintaining flexibility that supports promotional opportunities. Overall quality remains above average across most growing regions.

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

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

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Commodity Updates

Citrus (Grapefruit)

Star Ruby grapefruit are currently available from Riverside and the San Joaquin Valley. Peak sizing is 48-count, with good availability in those sizes.

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

Citrus (Lemons)

The lemon market remains steady, with availability expected to improve as District 1 (San Joaquin Valley) ramps up production over the next few weeks. District 2 (Ventura County/Oxnard) continues to supply limited volumes, while District 3 (Arizona/California Desert) is providing a significant portion of current supplies. 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 supplies are expected to gradually improve over the coming weeks, providing some relief to FOB pricing across all sizes. New-crop fruit continues to peak on 200-count and smaller sizes, limiting the availability of larger fruit and resulting in size substitutions. These conditions are expected to persist until sizing normalizes. Quality remains mixed, with occasional external blemishes and reduced shelf life.

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

Citrus (Oranges)

ALERT

Valencia season is wrapping up as the new crop of Navels continues to ramp up. Early production is peaking on 113-count and 138-count fruit. All shippers are expected to transition to Navels during the week of October 26.

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

Cucumber

Eastern cucumber supplies are expected to improve as warmer, sunnier weather follows recent rainfall in Georgia. In the West, supplies remain tight as Baja production winds down and mainland Mexico ramps up. Larger sizes continue to be limited, though availability is expected to improve over the coming weeks.

Commodity/Region	Supply	Price	Quality
Mexico (November - May)	Light	$$$	Good
Baja California (May - October)	Light	$$$	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 garlic crop continues to ship and is expected to remain available through late September. Quality is good, and supplies continue to meet expectations as the season progresses.

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 grapes are finally getting out from under the glut of supplies that we saw all summer. That situation is changing as most shippers are close to the end of harvest. That said, there are still plenty of “storage grapes” that were picked into totes to be packed later. Expect domestic and imported greens to overlap next month. At this point we are not expecting a gap between domestics and imported greens or reds. There is rain in the forecast this week which may effect supplies down the road.

Grapes (Green)

Commodity/Region	Supply	Price	Quality
	Steady	$$$	Good

Grapes (Red)

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

Green Onions

ALERT

Baja melon production has been limited in recent weeks due to continued heat, lower yields, and smaller sizing, keeping supplies tight and market conditions elevated. Supplies are beginning to improve, allowing the market to gradually soften. Availability is expected to continue improving as we move 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



Commodity Updates

Lettuce Iceberg

ALERT

Lettuce supplies remain very limited in Salinas Valley and Santa Maria due to reduced yields and ongoing INSV pressure. Huron is beginning to ramp up, which may provide some relief, but overall availability remains tight. Quality concerns continue with discoloration, misshapen heads, and occasional insect damage. Expect light supplies and firm markets to continue as demand remains strong and production challenges persist.

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, while green and red leaf conditions have improved in the Salinas Valley and Southern California. However, supplies remain below expectations, with demand continuing to outpace harvested volumes. Romaine hearts are moderately available, but ongoing supply constraints have pushed markets into the mid-$70s. Expect continued market strength as demand remains ahead of available supply.

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

Lettuce Tender Leaf

Good quality and steady supplies continue across all leaf items. Availability has supported promotional opportunities for tender leaf varieties, while other row crops remain 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 deal nears completion. Fruit is currently peaking on 9-count, with cooler weather and lower yields contributing to firmer pricing. Yuma production begins this week, though virus pressure is expected to limit early volume. Offshore supplies are anticipated to begin in November, with the transition to Yuma continuing through October and offshore fruit expected by 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 deal nears completion. Fruit is currently peaking on 5-count, with cooler weather and lower yields contributing to firmer pricing. Nogales honeydews are expected to begin toward the end of the month, with the transition to Yuma continuing through October and offshore supplies anticipated by late November.

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

Melon (Watermelon)

Watermelon demand and supply are both declining as cooler weather moves into key growing regions. Nogales production is expected to begin limited crossings soon, with improved availability anticipated in October.

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

Mushroom

Due to new government duties, pricing is expected to increase as demand continues to exceed available supplies. Tight market conditions are likely to persist in the near term.

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

Onions

Storage onion season is in full swing, with improved yields reported across the region. Supplies remain steady as a strong market and earlier-than-expected resolution of regional issues have supported availability. Freight continues to be a key factor influencing market conditions.

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

Pears

Pear sizing continues to trend large, with 100-count and smaller fruit remaining limited. Similar to the apple market, foodservice-sized pears are expected to stay tight, supporting elevated FOB pricing throughout the season.

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

Extreme weather has reduced pineapple harvests, tightening supplies through late October and early November. Contract orders remain stable, but limited open market availability may push prices higher. Quality remains good, with crowned 6-count and 7-count improving while crownless 8-count, 10-count, and organic supplies remain tight.

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

Potatoes

ALERT

New crop potatoes are in storage, with limited sizing and strong demand for 40–80 counts expected throughout the season. Lead time will be needed to secure product. Washington potatoes continue to show excellent quality, peaking on mid-sizes while larger and smaller counts remain tight. Sweet potato supplies remain limited until new crop, with Mississippi off to a slow start.

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

Squash

Eastern squash supplies remain limited but should improve with better weather in Georgia, while North Carolina nears the end of its season. Western mainland Mexico production is increasing, with good yellow squash availability. Zucchini markets may remain active due to ongoing weather-related supply concerns.

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

Stone Fruit

Domestic stone fruit season is winding down, with limited peaches and some remaining plum supplies available. Domestic kiwi and Asian pears remain in good supply and are available to support school program menus.

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

Tomatoes

ALERT

Round tomato markets remain elevated due to limited Tennessee and North Carolina supplies, along with inconsistent quality. Mexican availability is steady to limited, with smaller sizes more available while larger fruit remains extremely tight. Roma markets continue to be firm, especially on larger sizes. East Coast production remains minimal, and snacking tomatoes are extremely limited as demand continues to outpace Mexican supply.

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

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

Supply Partners



Weather Updates



CALIFORNIA

A low-pressure system will bring isolated showers and below-average temperatures through Thursday night, with additional rainfall totals expected between ¼–¾ inch. Morning lows will range from the upper 30s to mid-50s, with daytime highs in the low 60s to mid-70s. High pressure returns Friday, bringing back the marine layer and a gradual warming trend into the weekend, with temperatures reaching the upper 60s to mid-80s by Sunday.



MEXICO

Light and isolated showers are expected through the weekend, with most rainfall totals ranging from 0.02–0.20 inches. Temperatures will remain steady through Saturday before cooling slightly Sunday, with highs in the upper 60s to upper 70s through Saturday and mid-60s to mid-70s on Sunday. Overnight lows are expected to settle into the mid-40s to mid-50s through October 25.



FLORIDA

Temperatures will remain steady across the Florida peninsula through the weekend. Central and Northern Florida will stay mostly dry, while Southern Florida may see isolated to scattered showers and thunderstorms, especially over the weekend. Winds could gust 15–25 mph through Friday across Southeast Florida and the Tampa area. Highs will range from the mid-70s to near 80 in Northern Florida, with Central and Southern Florida reaching the low to mid-80s. Morning lows will range from the upper 40s to upper 50s in the north and the low 60s to low 70s across Central and Southern Florida.



ARIZONA

A Pacific upper-level low will bring increasing rain chances Wednesday, with the main storm event expected Wednesday night through Thursday. Repeated showers and thunderstorms near Scottsdale could produce around 1 inch of rain, with locally heavier amounts creating flash flood potential. Strong storms may also bring damaging wind gusts and hail. Buckeye is expected to see lighter rainfall around 0.20 inches, while Salome/Wenden receives only minimal amounts. Temperatures will cool into Friday before gradually recovering over the weekend. Yuma County lows will drop into the upper 50s to low 60s by Friday, with winds shifting from southerly gusts up to 25 mph Wednesday to northwest gusts Thursday before easing.

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

Freight Updates

Freight this week will certainly be a turning point as transition is approaching full swing, and wet weather approaching the west is certain. Shipper delays are significant, and the need for making other pickups to fill orders is becoming normal.



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

	10/05/26	10/12/26	10/19/26	Change from 2 year ago	Change from year ago	Change from week ago
U.S.	6.199	6.179	6.276	↑ 2.723	↑ 2.656	↑ 0.097
East Coast (PADD1)	5.951	5.908	5.984	↑ 2.394	↑ 2.309	↑ 0.076
New England (PADD1A)	6.476	6.441	6.470	↑ 2.710	↑ 2.527	↑ 0.029
Central Atlantic (PADD1B)	6.485	6.471	6.508	↑ 2.692	↑ 2.630	↑ 0.037
Lower Atlantic (PADD1C)	5.699	5.645	5.740	↑ 2.251	↑ 2.162	↑ 0.095
Midwest (PADD2)	6.286	6.259	6.352	↑ 2.809	↑ 2.788	↑ 0.093
Gulf Coast (PADD3)	5.819	5.809	5.903	↑ 2.704	↑ 2.647	↑ 0.094
Rocky Mountain (PADD4)	6.267	6.302	6.422	↑ 2.786	↑ 2.837	↑ 0.120
West Coast (PADD5)	7.229	7.240	7.394	↑ 3.184	↑ 2.973	↑ 0.154
West Coast less California	6.490	6.503	6.659	↑ 2.874	↑ 2.651	↑ 0.156
California	8.082	8.091	8.242	↑ 3.544	↑ 3.344	↑ 0.151

prices include all taxes

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

Crop Updates

A Change in the Weather

After several weeks of heat, the West Coast is getting a change in the weather. Rain is moving through California's growing regions this week, with the heaviest totals focused farther south. Salinas will see showers, while Santa Maria and Oxnard are taking on more meaningful rainfall. That creates another challenge for crops already trying to finish out a long season.



Lettuce remains high on the watch list. Iceberg, romaine and especially green leaf are still dealing with disease pressure, lower yields, inconsistent weights and tighter supplies as the Salinas season winds down. Huron is helping add volume and quality there has been encouraging, but the market remains firm as the industry works toward full desert production.
Berries are where this week's rain is being felt the fastest.



Strawberries were already slow to recover from the recent heat. California volumes are down across all growing regions, Santa Maria is moving into its normal seasonal decline, and Oxnard is producing smaller fruit with lighter yields after heat-related crop damage.



Now rain is adding another layer of pressure. Wet weather is slowing harvests and increasing bruising, softness, decay and other quality concerns. Santa Maria and Oxnard are the areas taking the biggest hit over the next several days. Supplies remain limited, markets are elevated, and shippers are focused on covering contracts and existing commitments.

Crop Updates

Mexico is not providing much relief yet either. Recent hurricane-related rains in Central Mexico and Baja have reduced crossings and tightened availability on strawberries, raspberries and blackberries. That lighter supply picture will continue over the next couple of weeks.

The good news this week is citrus.
New-crop California Navels are officially underway, and the early size profile is exactly what foodservice has been waiting for. Initial supplies are favoring 88ct and smaller, which have been some of the hardest sizes to find through the back end of the Valencia season.

Volume is building now and will continue increasing over the next three to four weeks. As more Navels come online, availability on smaller fruit will improve and pricing is easing.

After months of fighting for small oranges, the early Navel crop is a welcome change. For schools, grab-and-go, fresh-cut and other foodservice programs, these sizes are becoming much more promotable as volume builds.





