

The Source

Commodity of the Month - Apples

MARKET ALERTS

Strawberries: Supplies are tight as Salinas and Watsonville wind down. Warm nights and rain in Santa Maria are reducing yields. Slight cooling expected this weekend.

Brussels Sprouts: Supplies are limited due to insect pressure, decay, and small sizing in Salinas and Oxnard.

Lemons: Markets remain strong with tight supplies, especially on 140ct and smaller. District 2 is winding down; District 3 just starting. Imports are light, and Mexico's volume is down year over year.

Oranges: Valencias peaking on 72ct with 3 weeks left. School demand is tightening smaller sizes. Navels expected mid-October.

Green Onions: Green onion supplies are tight from Mexico; prices expected to rise next week.

Pineapple: Thunderstorms in Costa Rica limit pineapple supplies through 2025. Crownless pineapples are in high demand. Limited Mexican pineapples available. Expect order changes.

IN PEAK SEASON:

- Raspberries



SEPTEMBER 24, 2025

CROP UPDATES

Asparagus supplies are tight after Tropical Storm Mario cut Mexican yields by up to 50% and disrupted logistics. Northern Baja is winding down, and Sonora is starting slowly but expected to run through December. Peru is filling some gaps with strong quality from the south, though freight costs and global demand are limiting U.S. arrivals. Spot markets remain tight but stable, with relief possible as Sonora and Peru ramp up. [Read more](#)

WEATHER

California: A midweek upper low brings up to ¼" of rain and cooler temps. Warmer, near- to above-average temps return by the weekend as high pressure builds.

Mexico: Isolated showers midweek will increase Friday-Saturday, with heavier rain possible. Temps stay warm through Thursday, then cool into the weekend.

Florida: Isolated to scattered storms across Central/South Florida; North Florida sees more rain by weekend. Temps rise into the 90s, then cool slightly Sunday. Gusts near 20 mph through Friday.

Arizona: Highs hit 100–105°F midweek, then cool with rising rain chances. Storms likely in central AZ Friday, with flash flood risk; spreading into SE CA and Yuma by the weekend.

FREIGHT

Freight this week continues to inch closer to transition and to the southern growing regions. Product is being spread out across the growing regions creating long loading times for carriers especially out west. Idaho outbound continues to be a struggle with trucks being very tight. CA to FL is also seeing continuing signs of tight truck supply and elevated markets.

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Commodity Updates



Apples

The 2025 new crop is still ramping up. Reds, Fujis, and Pinks remain somewhat tight as the old crop phases out and the new crop comes in. Old crop Pink inventories are being stretched as we wait for the new crop to fully color. Gala and Honeycrisp supplies are strong, with Granny Smith and Golden Delicious improving steadily each week.

Commodity/Region	Supply	Price	Quality
Hudson, New York (September - June)	Steady	\$\$\$	Good



Asparagus

Tropical Storm Mario cut Mexican asparagus yields by up to 50% in some areas, keeping volumes steady but below expectations. Northern Baja wraps up by mid-October, while Sonora ramps up through December, mostly pre-contracted. Peru offers strong quality, but freight costs and global demand are limiting U.S. supply, keeping spot markets tight.

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



Avocados

Peak sizes are 48ct and 60ct, with markets still depressed. Flora Loca is the main crop, producing very clean fruit and minimal #2s, typical for this season. California's season is winding down and set to end soon. Offshore supplies are nearly finished, with no new vessels arriving and remaining fruit mostly in jumbo sizes.

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



Bell Peppers

Production is strong overall. Local supplies are ongoing but will begin to taper off in the coming weeks as cooler weather arrives. Georgia is set to start in two weeks, followed by Florida in late October. Supplies remain steady out west, with crops beginning their transition down starting with Coachella in October and Nogales in late November.

Commodity/Region	Supply	Price	Quality
California (May - June)	Steady	\$\$\$	Excellent
Ohio (Jun - Sept)	Steady	\$\$\$	Good
Mexico (Jun - Sept)	Light	\$\$\$	Good

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

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Commodity Updates



Berries (Blackberries)

Steady supplies continue out of California and Central Mexico, with no significant change in the moderate demand seen in recent weeks.

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



Berries (Blueberries)

Better volumes are expected to arrive from Peru next week. Central Mexico is just starting to move small amounts of product through Texas.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Excellent
Dover, Florida (Year Round)	Light	\$\$\$	Fair
McAllen, Texas (Year Round)	Light	\$\$\$	Good



Berries (Raspberries)

Steady supplies continue from California and Central Mexico, with moderate demand holding steady in recent weeks. Volume pricing is available out of Laredo, Texas.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Fair
McAllen (October - May)	High	\$\$\$	Fair



Berries (Strawberries)

ALERT

Strawberry supplies are tight as the Salinas and Watsonville seasons near their end. Santa Maria has faced recent rain and unusually warm overnight temperatures, with lows staying in the 60s. This is causing fruit to ripen before it sizes, resulting in smaller berries and lower yields. A slight cooling trend is expected heading into the weekend.

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

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

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Commodity Updates



Broccoli

Broccoli supplies and markets remain mostly steady. Some pin-rot is showing due to moisture on the crowns, mostly avoidable but impacting yields. Insect pressure remains a top concern. Expect the market to stay steady into next week.

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



Brussel Sprouts

ALERT

Brussels sprout supplies remain limited. Crops in the Salinas Valley and Oxnard are facing insect pressure, some decay, and smaller sizes.

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



Carrots

Harvest is underway in the Cuyama/Lancaster area and will continue through November. No sizing issues are expected in the near future. Please remember to submit snack pack orders at least 48 hours in advance.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	High	\$\$\$	Excellent
Kern County (October - Feb)	Steady	\$\$\$	Good
Various Northwest Regions (July - October)	Light	\$\$\$	Good



Cauliflower

Cauliflower supplies are mostly steady this week. However, recent heat followed by rain may disrupt supplies over the weekend, likely causing a slight market increase next week.

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



Celery

Overall, the market remains steady across all packs. Large sizes, especially 24 counts, are the most limited and carry the strongest pricing. Quality is reported as good by most suppliers, though slight seeding is being observed on arrivals. Inventories are expected to stay steady for the rest of 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)

Marsh Rubies are available, peaking at 48ct, and are shipped from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

ALERT

Markets remain strong across all sizes. District 2 (Ventura County/Oxnard) is currently the main growing region, with volumes declining weekly. Sizes 140ct and smaller remain extremely limited. District 3 (CA Desert/AZ) is starting lightly. Compared to last summer, markets are elevated due to higher demand and reduced imports. Offshore fruit continues to arrive lightly on both coasts, while Mexico's volume is down year over year.

Commodity/Region	Supply	Price	Quality
CA Desert/Yuma (October - February)	Steady	\$\$\$	Good
Oxnard/Ventura (February - September)	High	\$\$\$	Good
San Joaquin Valley (October - May)	High	\$\$\$	Good



Citrus (Limes)

The market is fairly steady, with a split between larger and smaller sizes. New crop is peaking on smaller fruit (230/250ct), while larger sizes (110s/150s) mostly come from the older crop. Offshore fruit from Colombia is also available, loading out of Florida.

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



Citrus (Oranges)

ALERT

Valencias are currently peaking on 72ct, with about three weeks left in the season. Gas treatments are running 3-4 days to aid regreening. School demand has picked up significantly, driving markets higher on 88ct, 113ct, and 138ct as availability tightens. The domestic Navel season is expected to start around mid-October.

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



Cucumber

The market is soft with plentiful supplies from GA, NC, Baja, Central Mexico, and now Nogales. Overall quality is good, with promotable volume available.

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

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

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Commodity Updates



Eggplant

Market steady to slightly lower with good quality reported. Promotable volume available on both coasts.

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



Garlic

The new California garlic crop is progressing well with good quality, complemented by ongoing Mexican supplies.

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



Grapes (Green / Red)

The Central Valley experienced rain last week. While the market showed some reaction, substantial inventories in coolers have kept prices mostly steady. Another round of rain is expected later this week, which could add upward pressure. The full impact of the rains may not be seen until November.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

ALERT

Green onion supplies are limited due to heat and rain in Mexico. Expect the market to gradually rise heading into next week.

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



Kale

Kale supplies are steady and strong currently, with similar conditions expected 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

Extreme heat in the growing regions has accelerated lettuce growth, resulting in lighter weights and puffiness throughout the week. Multiple shippers report average weights of 35-40 pounds, depending on the supplier. Expect to see outer leaf discoloration, some internal burn, and misshapen heads upon arrival.

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



Lettuce Leaf

Steady availability of romaine, green leaf, and red leaf is expected throughout the week. Southern California supplies remain limited, while the Salinas Valley has good volume. Warm temperatures are causing tip and fringe burn reported by multiple shippers. Romaine hearts have moderate availability in both regions, with sizing and weights expected to be above average.

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



Lettuce Tender Leaf

Tender leaf supplies are slightly limited due to recent heat and rain Wednesday morning. Expect the market to increase slightly heading into the weekend.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Fair
Oxnard, California (Year Round)	Steady	\$\$\$	Fair
Yuma, AZ (Nov. - May)	Steady	\$\$\$	Fair



Melon (Cantaloupe)

The domestic cantaloupe market is starting to firm as sizing from Westside fields impacts supply. The second cut and rising demand are pushing prices higher. Fields are still mainly producing 9s, so sizing will remain a challenge until the transition to Yuma. 12/15s will be tight, with Brix levels ranging from 13 to 16.

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

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

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Commodity Updates



Melon (Honeydew)

The domestic honeydew market is starting to firm as sizing from Westside fields impacts supply. The second cut and increased demand are driving prices higher. Fields are still mainly producing 5s, but sizing on 6/8s is improving. Mexican honeydews are expected to be available starting in October, weather permitting.

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



Melon (Watermelon)

Domestic watermelons are available from both the West and East Coasts. Prices are beginning to rise as demand grows and supply tightens. Mexican watermelons are available through Texas, with Nogales supplies expected in a few weeks.

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



Mushroom

Supplies are readily available now but typically tighten as the holiday season approaches.

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



Onions

Onions are currently available from Washington and Idaho, as the California and New Mexico seasons have ended. Demand remains strong across the U.S. We will continue to monitor rain in Idaho and its impact on harvest schedules.

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

The pear market remains steady with lower pricing. California Bartletts are nearing the end of their season and will soon transition to the post-season. Washington is ramping up with ample volume to replace California's supply.

Commodity/Region	Supply	Price	Quality
Sacramento Valley (July-September)	High	\$\$\$	Good
Hood River, Oregon (August-July)	Light	\$\$\$	Good
Yakima, Washington (August-July)	Light	\$\$\$	Good

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

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Commodity Updates



Pineapples

ALERT

Thunderstorms continue to impact growing regions in Costa Rica and are expected through September 2025, limiting pineapple supplies for the remainder of the year. Crownless pineapples remain in high demand. Expect substitutions, cancellations, and order changes. Mexican pineapples are available but in limited quantities.

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



Potatoes

Idaho's potato market is steady with new crop 40-70 counts. Burbanks and mostly #1 Norkoths are available, while #2s remain tight. Washington's new crop has good quality with smaller sizes. Colored potatoes come from multiple states. NC sweet potatoes are starting small, with some curing issues. Recent rain in Eastern Idaho has delayed harvest.

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



Squash

Midwest production is winding down while NC and GA are in full swing with promotable volume and good quality. West Coast supplies are coming from WA, Santa Maria, Fresno, Baja, and now Nogales.

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



Stone Fruit

Nectarines are finished for the season, and peaches will likely wrap up by week's end. Plums remain in good supply. Domestic kiwi has started, with volume increasing over the next few weeks. The market is expected to stay steady at higher prices. Fall fruits like Asian pears, persimmons, pomegranates, and quince are now in production.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (May-October)	Steady	\$\$\$	Good



Tomatoes

Markets are fairly steady with good supplies of rounds and grapes on both coasts. Romas are tighter from Mexico but more available domestically. Supplies will slow as cooler weather approaches and southern transition begins. Northern Florida starts early October. West Coast supplies steady in CA, lighter in Baja.

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

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

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Weather Updates



CALIFORNIA

An upper low will bring a moderate chance of rain and storms Wednesday, with up to ¼" of rain. Temperatures will cool below normal under heavy clouds, with morning lows in the mid-50s to low 60s and daytime highs in the upper 60s to mid-70s near the coast, rising to mid-70s to mid-80s inland. The low moves out Thursday, allowing high pressure and the marine layer to return, bringing near- to above-average temperatures through the weekend.



MEXICO

Shower activity will be isolated Wednesday through Thursday, increasing Friday into Saturday. Rainfall totals will generally range from 0.05" to 0.25" through Thursday, with higher amounts expected Friday and Saturday. By Sunday, showers will become much more scattered and isolated.

Temperatures will be seasonably warm through Thursday, then cool down later in the week. Highs will range from the upper 70s to upper 80s on Wednesday, mid-70s to mid-80s Thursday and Friday, and drop to the low 70s to low 80s over the weekend. Lows will stay steady in the upper 50s to mid-60s through Sunday.



FLORIDA

Isolated to scattered showers and thunderstorms are expected across most of Central and Southern Florida. Northern Florida will see increasing shower activity toward the weekend as a cold front approaches. Highs will range from the upper 80s to low 90s through Thursday, rising to the low-mid 90s Friday into Saturday, then cooling slightly to the mid 80s to low 90s on Sunday. Lows will be in the mid 60s to low 70s in Northern Florida and low to upper 70s in Central and Southern Florida. Winds will gust near or below 20 mph through Friday.



ARIZONA

A brief surge of high pressure will raise daytime highs to 100-105°F across most valleys Wednesday and Thursday, followed by steady cooling into the weekend with increased clouds and rain chances.

An upper-level low off the California coast will move into Arizona by Friday, bringing tropical moisture that may trigger showers and thunderstorms over central Arizona, with possible spread into southeast California Saturday and Yuma Saturday night into Sunday morning.

Central Arizona faces the highest risk of flash flooding and thunderstorms on Friday, with conditions easing somewhat on Saturday.

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

Freight Updates



Freight this week continues to inch closer to transition and to the southern growing regions. Product is being spread out across the growing regions creating long loading times for carriers especially out west. Idaho outbound continues to be a struggle with trucks being very tight. CA to FL is also seeing continuing signs of tight truck supply and elevated markets.



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

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

	09/08/25	09/15/25	09/22/25	Change from	
				week ago	year ago
U.S.	3.766	3.739	3.749	↑ 0.010	↑ 0.210
East Coast (PADD1)	3.772	3.748	3.745	↓ -0.003	↑ 0.168
New England (PADD1A)	3.955	3.961	3.962	↑ 0.001	↑ 0.165
Central Atlantic (PADD1B)	3.937	3.920	3.908	↓ -0.012	↑ 0.095
Lower Atlantic (PADD1C)	3.693	3.663	3.664	↑ 0.001	↑ 0.197
Midwest (PADD2)	3.754	3.710	3.731	↑ 0.021	↑ 0.220
Gulf Coast (PADD3)	3.404	3.389	3.400	↑ 0.011	↑ 0.209
Rocky Mountain (PADD4)	3.754	3.722	3.747	↑ 0.025	↑ 0.139
West Coast (PADD5)	4.533	4.523	4.524	↑ 0.001	↑ 0.285
West Coast less California	4.163	4.134	4.123	↓ -0.011	↑ 0.308
California	4.958	4.971	4.985	↑ 0.014	↑ 0.258

*prices include all taxes

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

Crop Updates



Asparagus Outlook: Weather Jolts Mexico, Peru Picks Up Slack

What was shaping up to be a strong fall start for asparagus out of Mexico has been tempered by unexpected weather. Tropical Storm Mario brought surprise rainfall across several production regions, especially near Ciudad Constitución, Baja California Sur, resulting in a rapid end to older fields and lower yields on new ones.

Harvest numbers in that area were 35 to 50 percent lower than originally projected and supply was further constrained due to interstate closures. While there was concern that this might result in a sudden flush of product, Mexican import volume has remained relatively steady but lower than projections.

In Northern Baja California, the season continues to wind down, with most shippers expecting to finish by the second week of October. Sizing in this region is still leaning standard and large, with limited small, extra-large, and jumbo packs.

Further east, early fields are beginning to harvest near Sonoyta and Hermosillo, Sonora, although slower than expected. These areas also saw some rainfall from Tropical Storm Mario, but growers are still assessing any potential impact. If conditions hold, Sonora will produce through December and help stabilize fall supply. Much of this product is already committed to contracts, which could keep the spot market tighter than usual through October and November.

In Peru, most of the volume bound for the U.S. is coming from the Ica region in the south, where growing conditions have been ideal. Quality is excellent, with firm tips and clean spears. The La Libertad region in northern Peru is also harvesting, but cooler temperatures and cloudy skies are slowing progress. The northern crop is expected to peak between late November and January, which will align well with Caborca's season in Mexico.

While supply is gradually improving, high demand and elevated freight costs are still influencing how much Peruvian product arrives in the U.S. Some product is being diverted to other global markets due to stronger pricing and air freight premiums, especially from competing commodities like blueberries.

Looking ahead, asparagus supply will be sufficient heading into the holiday push, but availability will depend on how quickly Sonora builds steam and whether Peru's northern region can hit its forecasted volumes. For now, sizing and quality are strong, and pricing is showing signs of relief.



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