

The Source

Commodity of the Month - Avocados

MARKET ALERTS

Asparagus: Mexican asparagus is tight due to demand and weather, with Baja down and Sonora stabilizing by mid-October. Peru's vessel issues cause delays. Demand stays strong short-term but supply should ease by mid-month.

Strawberries: Supplies are limited after last week's weather but should improve slightly by week's end. Oxnard production will increase in the coming weeks.

Broccoli: Supplies are tight due to pin-rot and insect pressure. Market expected to firm next week.

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

Cauliflower: Supplies are limited; market expected to rise slightly next week.

Celery: Market active north and south; large sizes, especially 24 counts, are tight. Slight seeder reported, but quality is above average. Supplies moderate to light this week.

Lemons: Markets strong; Ventura/Oxnord volume declining. Small sizes (140ct and under) limited. CA Desert/AZ starting light. Demand up, imports down vs. last year. Offshore and Mexico volume light.

Oranges: Valencias peak on 72ct with 3 weeks left. School demand up, tightening smaller sizes and raising prices. Navels start mid-October.

OCTOBER 1, 2025

CROP UPDATES

Salinas harvest is winding down with quality slipping due to recent rain, humidity, and temperature swings. Iceberg, romaine, and broccoli face disease, insect pressure, and lower yields. Yuma had early rain damage, and Huron's limited harvest looks promising. Weather challenges call for flexible harvest and close monitoring. [Read more](#)

WEATHER

California: Light rain chances remain as the low exits Wednesday with cool temps. High pressure builds Thursday, warming to near or above normal by Saturday.

Mexico: Isolated showers possible this weekend; most areas stay dry. Temps seasonably warm, highs in 70s-80s, lows mid-50s-60s.

Florida: Humberto and Imelda in the Atlantic are moving east, away from the US coast, with no major Florida impacts expected. Showers will increase this weekend with seasonal temps—highs mid-80s to low 90s, lows mid-60s to mid-70s. Winds gust 15-25 mph midweek.

Arizona: Temps near normal through weekend with highs in 90s; upper 90s in parts of AZ and SE CA Thu-Fri. Lows mid-60s to low 80s, cooling by Sunday. Winds shift from light southerly to gusty NW Friday, then lighter northerly.

FREIGHT

Freight this week is active with fall markets upon us. As growers shift to winter regions, we anticipate extra miles between pickups. We are preparing to meet this scenario head on by using resources that will help alleviate loading delays and keep our trucks running efficiently. Get with your Pro*Fresh rep today and find out how we can make the difference for you!



IN PEAK SEASON:

- Apples



- Pears



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Commodity Updates



Apples

Reds, Fujis, and Pinks remain on the tighter side as old crop inventories continue to wind down, while Gala, Honeycrisp, Granny Smith, and Goldens show strong availability with supplies improving steadily each week. Cooler nights in Yakima, dipping into the high 40s and low 50s, are enhancing color development particularly benefiting Reds, Fujis, and Pinks.

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



Asparagus

ALERT

Mexican asparagus remains tight due to strong demand and weather-related issues, with Baja down and Sonora recovering. The Valor vessel breakdown in Peru disrupted supply, adding to volatility. Demand stays strong short-term but is expected to ease by mid-October as supply rebounds.

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



Avocados

Peak sizes are 48ct and 60ct with markets remaining depressed. Flora Loca is the main crop, producing very clean fruit with minimal #2 grade, typical for this season. California's season is slowing and nearing its end. Offshore fruit supply is also winding down, with no more vessels arriving and remaining fruit mostly jumbo-sized.

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



Bell Peppers

Eastern supplies are strong from Michigan and New Jersey, with Georgia ramping up. Quality is mixed, but all sizes are available. Western supply remains light, with no significant volume from Mexico expected until late November.

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

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

Supply Partners



Commodity Updates



Berries (Blackberries)

Steady supplies continue from California and Central Mexico with no significant changes.

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



Berries (Blueberries)

Supplies remain tight, but Peruvian offshore volume is expected to improve gradually, with more consistent container arrivals starting next week. Early fruit quality has been very good. Central Mexico is just starting its season with light volume.

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



Berries (Raspberries)

No significant changes—strong volume continues from California, Central Mexico, and Baja.

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



Berries (Strawberries)

ALERT

Strawberry supplies remain very limited following last week's heat and rain. Shippers have been stripping fields, but yields are expected to improve slightly by the end of the week amid strong demand. Oxnard production is expected to ramp up more meaningfully in the coming weeks.

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

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

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Commodity Updates



Broccoli

ALERT

Broccoli supplies are tight this week, with some yield loss from crown moisture causing pin-rot, though mostly avoidable. Insect pressure remains a key concern. Expect the market to strengthen heading into next week.

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



Brussel Sprouts

ALERT

Brussels sprout supplies remain limited as Salinas Valley and Oxnard face ongoing insect pressure, decay, and smaller-sized crops.

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



Carrots

Harvest is ongoing in the Cuyama/Lancaster area and will continue through November. No sizing issues are expected soon. Please remember to submit snack pack orders 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)	Steady	\$\$\$	Good



Cauliflower

ALERT

Cauliflower supplies are limited this week due to recent heat and rain disruptions. Expect the market to rise slightly heading into next week.

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



Celery

ALERT

This market is active both north and south. Large sizing is the tightest in availability, twenty-four counts in particular. Slight seeder is being reported but otherwise the quality has been reported to be above average. Expect supplies to be moderate to light for 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, shipped from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

ALERT

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

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



Citrus (Limes)

Lime markets have stabilized with prices leveling off. The new crop favors smaller sizes with better color, though some rind issues are present. Large fruit are limited, lower quality, and priced higher.

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

ALERT

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

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

Strong availability and quality in the East with peak production in NC, GA, NY, and MI. Western supply comes mostly from Baja, Central Mexico, and Sonora, with quality improving. Mainland Mexico's fall crop starts mid-October, expected to increase volume.

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

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

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Commodity Updates



Eggplant

Adequate supply in the East, with best quality from newer plantings. Western volume mainly from California, with some from Washington. Mainland Mexico expected to start contributing by mid-November.

Commodity/Region	Supply	Price	Quality
Ohio/NC/MI (June - September)	Steady	\$\$\$	Good
California (May - October)	Steady	\$\$\$	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, but ample stored inventories kept markets mostly steady. Another round of rain is expected later this week, potentially creating some upward pressure, though significant impact may not appear until November. Overall, supplies remain ample, keeping prices stable despite weather concerns.

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

Green onion supplies remain 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)	Steady	\$\$\$	Good



Kale

Kale supplies are steady and good 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

Demand continues to outpace supply for at least two weeks due to reduced yields caused by INSV and high heat. Industry-wide, lighter weights and puffiness are common, with leaf discoloration, internal burn, and misshapen heads appearing on arrivals. Pricing on all value-added lettuce items has escalated accordingly.

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



Lettuce Leaf

Unlike lettuce, green and red leaf, as well as romaine, have remained steady with multiple shippers. Romaine hearts in all pack sizes will stay consistent throughout the week. Slight twisting has been noted, and warm temperatures may cause some tip and fringe burn on all leaf items. Sizing and weights are expected to remain above average from multiple suppliers.

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 last week's rain. Expect the market to rise 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 Westside cantaloupe deal is wrapping up in the next few weeks, with the transition moving south, followed by offshore supply. Strong demand and excellent quality are pushing the market. Fields are still producing mostly 9s, with 12s and 15s remaining tight until the Yuma transition. Brix levels are high, ranging from 13-16. Recent unexpected rain in the Central Valley has impacted some fields.

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 Westside honeydew season is winding down, with the transition south and to offshore supply approaching. Nogales honeydews are expected in the coming weeks. Strong demand and excellent quality are driving the market. Fields are mainly producing 5/6s, with 8s remaining tight until the Yuma transition. Brix levels are high at 13–16. Recent unexpected rain in the Central Valley has impacted some fields.

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



Melon (Watermelon)

Domestic watermelons are available on both coasts, but supplies are tightening and prices are starting to rise. Mexican watermelons via Texas and Nogales are expected in a few weeks.

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



Mushroom

Excellent supplies are starting to tighten as growers shift focus to fall commitments.

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



Onions

Onions are currently available out of Washington and Idaho, as California and New Mexico seasons have ended. Demand remains strong across the U.S. Rain in Idaho could impact harvest schedules and will need to be closely monitored.

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 markets remain steady at lower prices, supported by ample volume from Washington to carry the season forward.

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 Costa Rica's growing regions and are expected through October 2025. Pineapple supplies remain very limited and may stay tight for the rest of the year. Crownless pineapples are in high demand. Expect substitutions, cancellations, and order changes. Mexican pineapples are available but limited.

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

Idaho's new crop has normalized on 40-70s, with Norkotahs dominant and Burbanks slowly starting. Mostly #1 grade; #2s remain tight. WA crop shows strong quality, peaking on smaller sizes. Color potatoes are available. New crop sweet potatoes have begun in NC with limited volume and some curing issues expected to settle in a few weeks.

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

Mexico has limited grey squash with strong demand keeping prices firm, but more volume and lower prices are expected soon. Local supply on squash and yellow is good, with Georgia offering strong promotable volume. West Coast supplies are also strong from Santa Maria, Fresno, Baja, and now Nogales.

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

Nectarines have finished for the season, with peaches expected to wrap up by week's end. Plums remain plentiful. Domestic kiwi has begun, with volume set to increase in the coming weeks, and markets holding steady at elevated levels. Fall fruits, including Asian pears, persimmons, pomegranates, and quince, are now in season and actively being harvested.

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

Roma: Steady supply; shifting to North Florida and Palmetto/Ruskin soon. California strong; Mexico/Central mixed quality.

Rounds: Steady East supply; Virginia strong, Tennessee slowing; Florida/Georgia starting. West and Mexico steady.

Grape: Variable volumes; Virginia winding down; Florida and Mexico ramping up mid-month to December.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Steady	\$\$\$	Good
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California (July - October)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Weather Updates



CALIFORNIA

As the low exits the region Wednesday, light rain chances remain with near to below-average temperatures. Morning lows will range from the mid-40s to low 60s, with daytime highs in the mid-60s to mid-70s near the coast and mid-70s to mid-80s inland. High pressure builds Thursday, gradually warming temperatures to near or slightly above normal by Saturday—low 60s to low 80s near the coast and low to mid-80s south of Soledad.



MEXICO

Isolated showers are possible through the weekend, with most areas expected to stay dry. Rainfall totals will range from 0.05" to 0.30", with higher amounts possible in thunderstorms. Temperatures will remain seasonably warm, with highs in the low 70s to low 80s and lows in the mid-50s to low 60s through Sunday.



FLORIDA

Humberto and Imelda are both in the Atlantic. Imelda is closer to the southeast US but both are expected to be ushered eastward, away from the US coast. No major impacts to the state of Florida are anticipated. Otherwise shower activity will increase over the region as we move into and through the weekend. Temps will be more seasonal but wetter over the next five days. Highs in the mid to low 90s on Wednesday and low-upper 80s for Thursday through Sunday over most of the state. Lows in the mid 60s to mid 70s through the weekend. Winds will gust near 15 mph on Wed and closer to 25 mph on Thursday and Friday over a good portion of the state.



ARIZONA

Temperatures will stay near seasonal normals through the weekend under a moderate high-pressure ridge. Highs will be in the low to mid-90s across most valleys, with some upper 90s in central Arizona and southeast California Thursday and Friday. Morning lows will range from the mid-60s to low 80s through Friday, cooling to the low to mid-60s by Sunday. Winds shift from slight southerly Wednesday and Thursday to stronger northwesterly gusts of 20-25 mph Friday, then weaken and turn northerly Saturday and Sunday.

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



Freight Updates

Freight this week is active with fall markets upon us. As growers shift to winter regions, we anticipate extra miles between pickups. We are preparing to meet this scenario head on by using resources that will help alleviate loading delays and keep our trucks running efficiently. Get with your Pro*Fresh rep today and find out how we can make the difference for you!



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

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

	09/15/25	09/22/25	09/29/25	Change from	
				week ago	year ago
U.S.	3.739	3.749	3.754	↑ 0.005	↑ 0.210
East Coast (PADD1)	3.748	3.745	3.750	↑ 0.005	↑ 0.179
New England (PADD1A)	3.961	3.962	3.962	0.000	↑ 0.174
Central Atlantic (PADD1B)	3.920	3.908	3.902	↓ -0.006	↑ 0.100
Lower Atlantic (PADD1C)	3.663	3.664	3.673	↑ 0.009	↑ 0.210
Midwest (PADD2)	3.710	3.731	3.731	0.000	↑ 0.211
Gulf Coast (PADD3)	3.389	3.400	3.413	↑ 0.013	↑ 0.201
Rocky Mountain (PADD4)	3.722	3.747	3.732	↓ -0.015	↑ 0.120
West Coast (PADD5)	4.523	4.524	4.532	↑ 0.008	↑ 0.306
West Coast less California	4.134	4.123	4.143	↑ 0.020	↑ 0.346
California	4.971	4.985	4.981	↓ -0.004	↑ 0.262

*prices include all taxes

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



Crop Updates

Field Quality Slips as Salinas Winds Down

As a Salinas Valley native, this time of year is one of my favorites. Warm evenings, cool mornings, and golden sunrises over the hills are what make fall here so special. But even with the beautiful weather, it's also a signal that the growing season is winding down, and this year, it's shaping up to be one of the more challenging finishes we've seen in a while. Recent rainfall, elevated humidity, and wide swings in daytime temperatures have made things tough in the fields. Iceberg markets jumped sharply after harvests were delayed or skipped due to muddy rows. Some growers are cutting heads earlier than usual to stay ahead of breakdown, which is leading to lighter boxes and inconsistent cartons at the cooler. The heat that followed the rain has only added to the pressure, with diseases like INSV and Sclerotinia showing up in both inland and coastal fields.

Romaine and green leaf lettuce are also feeling the stress. Plants are showing more outer leaf damage, mildew, and signs of weaker structure. Crews are trimming more aggressively at harvest to maintain quality, but that means lower yields and less visually perfect product. Broccoli and cauliflower are dealing with similar challenges. Insect pressure is increasing, especially from diamondback moths and aphids, and pin rot is becoming more common. Post-harvest, value-added shelf life is taking a hit, even with proper handling, as the raw product is just more vulnerable in these conditions.

Looking ahead, the forecast for Salinas is mostly sunny with cool mornings, but we may see some drizzle midweek. While it doesn't sound like much, even light moisture can keep plant surfaces wet for longer and raise the risk of mildew or decay, especially when paired with warm afternoons.

Meanwhile, Yuma experienced some rain in early September, which caused localized flooding and damage to some first plantings. It's still too early to fully gauge the impact, but the desert transition could be a little bumpier than normal as we move through November. We'll have a clearer picture once the stands mature and crews begin prepping fields later this month.

The Huron district is expected to begin harvesting in mid-October. While production there is more limited than in Salinas, early field reports are positive. Quality is looking strong on the handful of items grown there, which could offer a helpful bridge as Salinas winds down and the fall transition begins.

We're encouraging partners to stay flexible and stay close to the field. With these weather swings, careful harvest timing and quicker turns will go a long way in keeping product consistent. The views may be beautiful this time of year, but the work in the field is anything but easy.



JOEY PIEDIMONTE
SOURCING MANAGER