

The Source

Commodity of the Month - Romaine

MARKET ALERTS

Brussel Sprouts: Extremely limited; Salinas and Oxnard facing insects, decay, and small sizing.

Cantaloupe: Westside deal ends; Florida offshore fruit starting. Domestic cantaloupe prices high due to low yields, mainly 9s, with sizing and cosmetic issues.

Cauliflower: Supplies limited; availability may drop slightly next week.

Celery: Market firm; Southern California supplies moderate-light, value-added up, quality good, all sizes available.

Grapes: Grape market strengthening; green grapes tight, reds lasting into mid-December. Early Peruvian imports increasing late November–early December.

Green Onion: Supplies tightening; prices expected to rise next week.

Lettuce (iceberg): Lettuce demand exceeds supply; Yuma and Salinas limited, value-added pricing up, defects present, cartons 35–41 lbs.

Lettuce Tender Leaf: Supplies very tight; limited availability this week.

Pineapple: Costa Rica thunderstorms limit pineapple supplies; crownless in high demand, prices rising, potential substitutions and port delays.

Strawberries: Remain light; California recovering, Mexico limited by cold and transport, Florida increasing, Baja starting soon. Holiday demand easing.

NOVEMBER 26, 2025

CROP UPDATES

December outlook: Desert production improving, lettuces stabilizing, and strawberries, Brussels sprouts, and green onions tight. Potatoes and onions strong, but freight remains a challenge. Holiday demand easing as supply begins to normalize. [Read more](#)

WEATHER

California: Clouds and light showers Wednesday–Friday, then clearing. Lows mid-30s–low 50s; highs mid-50s–mid-60s, warming to upper 50s–low 70s for the weekend.

Mexico: Warm and mostly dry, highs mid-70s–mid-80s, lows upper 40s–upper 50s.

Florida: Warm and dry through Sunday, highs upper 70s–mid-80s, lows 50s–60s, winds 15–20 mph, isolated sprinkles only.

Arizona: Wetter pattern through Friday, showers taper Saturday; highs low–mid 60s rising to mid-70s, lows mid-40s rising to ~50 by Sunday.

IN PEAK SEASON

- Avocados
- Oranges
- Pears
- Potatoes

FREIGHT

Freight this week sees the challenges of transition from Salinas to Yuma drawing to a close. We do anticipate Friday, November 26th to be the peak of Thanksgiving Holiday pressure and recommend extra focus to ensure trucks are loaded and rolling efficiently. Happy Holidays from the Pro*Fresh Logistics team, we are Thankful for the partnerships, new and old.

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Commodity Updates



Apples

No changes in the apple market. Packouts continue to skew toward larger sizes, leaving smaller apples in limited supply. Sizes 125s and 138s remain available, though inventories are tight, while 113s and 100s are more readily accessible.

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



Asparagus

Mexican asparagus supplies are steady to slightly lower as holiday demand raises prices. Southern Baja leads production, with Sonora winding down and Central Mexico starting up. More regions open late December. Peru is increasing shipments with strong Northern quality, though large sizes are limited. This week's arrival will be slightly lighter than last week.

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



Avocados

Markets remain soft, with plenty of fruit still on the trees and lighter demand. Aventajada is the primary crop being harvested and shipped. Dry matter and oil content are similar across both crops, generally in the mid to high 20s.

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



Bell Peppers

California: Light volume and smaller sizes, with the desert deal wrapping up soon.

Georgia: The season is essentially finished. Florida is slow this week but improving, and a new region (Loxahatchee) is beginning.

Mexico: Volume continues to increase through McAllen and Nogales. Markets should remain steady to slightly lower after the holidays, with stronger supplies expected the first week of January, especially on colored bell peppers.

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

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

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Commodity Updates



Berries (Blackberries)

No significant changes from last week. Fruit supplies remain strong from both Baja and CMEX, with steady markets and consistently good quality.

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

Peruvian supplies are winding down, though a few containers are still en route. Central Mexico is ramping up production, shipping through McAllen, Texas. Quality from both regions has been very good, and we expect that to continue into December. Markets have softened.

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

No notable changes from last week. Fruit supplies remain strong from Baja and CMEX, with steady markets and consistently good quality.

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

ALERT

Strawberries remain in light supply across all districts. California is gradually recovering from recent weather, while Central Mexico is working to ramp up but is facing production challenges from cold temperatures and transportation delays caused by road blockages. Florida has started production, and volumes should increase over the next few weeks. Baja is expected to begin in another week or two, depending on weather. Overall demand is likely to ease with the upcoming holiday.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Light	\$\$\$	Good
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McAllen (November - May)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Broccoli

Broccoli supplies are slightly limited as the Salinas season winds down and recent rains impact harvests. Expect the market to ease slightly going into next week.

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



Brussel Sprouts

ALERT

Brussels sprout supplies remain extremely limited. Salinas Valley and Oxnard regions are dealing with insect pressure, some decay, and smaller-sized produce.

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



Carrots

Harvest has begun in the Bakersfield region. Jumbo sizes remain tight due to smaller sizing, as shippers had to enter the fields earlier than expected because of weather. Snack pack orders should be placed at least 48 hours in advance.

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



Cauliflower

ALERT

Cauliflower supplies remain limited this week as the Salinas season winds down. Expect a slight decrease in availability going into next week.

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



Celery

ALERT

The market is firm, with moderate to light supplies expected from Southern California for the rest of the week. Value-added products are seeing higher pricing. Quality is generally good, with only slight seeder issues reported. All sizes are available, though overall production will be light.

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 being shipped from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

Relief is starting in the market as District 1 (San Joaquin) begins light harvesting. Current volumes are limited as fruit needs a few days to color, similar to navels. Cooler nights in the coming weeks should help ramp up production. District 3 (CA Desert/AZ) remains the main growing region, though volumes are expected to decline over the next few weeks. Sizes 140ct and smaller continue to be extremely limited. Mexico is also active, so for South Texas shipments, contact us as needed.

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



Citrus (Limes)

The lime market is tightening with lower volumes, and active markets are expected through early 2026 due to holiday demand. Large sizes are peaking now, while smaller sizes will peak by mid-December with the new crop. Some lots may show occasional styler. Prices are expected to rise for the holidays, so book holiday needs early.

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



Citrus (Oranges)

Navels are in full swing as the main variety. Markets are stabilizing following heavy rain in the Central Valley. Peak sizing is shifting toward 72ct, with smaller sizes tightening closer to December and January. Current gas times are around 2 days, with brix at approximately 12. Colder nights are helping to reduce gassing times.

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



Cucumber

Mexico: Good supply this week with steady markets.
Florida: Most growers are now underway. Volume is lighter this week, but production remains steady with adequate supply ahead. Markets are expected to remain stable.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Steady	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good

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

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Commodity Updates



Eggplant

Georgia is finished, and Florida (Immokalee) is done. Volume is ramping in South/Central Florida and Mexico (Nogales). Markets are expected to be slightly higher, though high freight costs may make Florida more attractive for the East Coast.

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



Garlic

The California garlic crop is progressing 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

ALERT

The grape market is expected to strengthen through the month. Domestic green grapes are tightening faster than reds, with some growers finished for the season. Greens from storage should last through the final week of November, while reds are expected into mid-December. Early Peruvian imports have started arriving on the East Coast, with volumes building on both coasts by late November into early December.

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

ALERT

Green onion supplies are tightening due to recent rains reducing yields. Expect the market to rise heading into next week.

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



Kale

Kale supplies and quality remain mostly good, with similar conditions expected 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

ALERT

Demand continues to exceed supply heading into the holiday. Recent poor weather in Salinas and last week's rain in Yuma have limited availability, with Yuma production running moderate to light. Escalated pricing will remain in effect on all value-added lettuce items at least through this week. Common defects include discoloration, brown butts, and misshapen heads, with carton weights ranging from 35-41 pounds.

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



Lettuce Leaf

Demand is steady across all leaf items. Romaine and romaine hearts remain the most limited, while green and red leaf and butter lettuces have better availability compared to recent weeks. Value-added leaf items are on escalators. Quality issues reported include discoloration and tip or fringe burn. Most production is currently occurring in Yuma.

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



Lettuce Tender Leaf

ALERT

Tender leaf supplies remain very tight due to lower yields from insect pressure and recent hail. Expect limited availability throughout the week.

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



Melon (Cantaloupe)

ALERT

The Westside deal has concluded. Cantaloupe prices are elevated due to vessel delays and lower yields entering the U.S. Mexican melons are available, but border delays are limiting new supplies. Offshore melons are entering the market this week, mainly in 9s, with sizing expected to remain a challenge through the rest of the month.

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 deal is complete. Honeydew pricing is steady, supported by good supplies of Mexican fruit. While Mexican melons are available, border delays are limiting new arrivals. Offshore melons remain tight and are primarily reserved for contracts.

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



Melon (Watermelon)

Domestic watermelons are finished. Prices remain steady, with Mexican watermelons from Nogales supplying the Midwest and East Coast. Limited availability is coming from Mexico via Texas and Nogales, as last month's rain impacted production. Offshore watermelons are also available in limited quantities.

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



Mushroom

Supplies are improving following post-holiday demand.

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



Onions

Onions are available from Washington, Idaho, and Utah, with strong domestic demand. Rain in Idaho may impact trucking. All product is in storage, and weather and transportation will drive the market through year-end. Reefers and rail are recommended, while flatbeds are not advised due to weather 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

The pear market is steady, with good production of Anjou, Bartlett, Bosc, and Red pears. Foodservice sizes are readily available across all varieties.

Commodity/Region	Supply	Price	Quality
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 are affecting Costa Rica's growing regions and are expected to continue through the end of October into early November 2025. Pineapple supplies remain very limited and may continue to be tight for the rest of the year. Crownless pineapples are in high demand. Expect substitutions, cancellations, and order changes. Prices will rise starting this week due to the holiday, and port delays may impact loading schedules.

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

Harvest is complete, with good supplies and steady demand for the holiday pull. Norkoths are the main variety, Burbanks slowly available, and Washington potatoes are peaking on mid sizes. Large and small counts remain tight. Trucking and busy coolers may cause delays. New crop sweet potatoes are starting in North Carolina.

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: Zucchini supply remains strong; yellow squash is limited with a wide price spread.

Florida: Production expected to increase over the next 7-14 days. Markets are likely to ease post-Thanksgiving as demand softens and supplies improve.

Commodity/Region	Supply	Price	Quality
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Mexico (June - September)	Steady	\$\$\$	Good
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Florida (November - May)	Light	\$\$\$	Good
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Stone Fruit

Imported peaches and nectarines are expected on both coasts by mid-December. Pomegranates, persimmons, and Asian pears will remain in good supply through November and December. The domestic kiwi market is expected to stay steady at higher price levels.

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

Markets are steady to slightly lower post-Thanksgiving.
Romaine: Florida very tight; Mexico short; quality fair-good.
Grapes: East ample; Mexico lighter.
Rounds: East steady; West light-moderate.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Steady	\$\$\$	Good
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Florida (November - May)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Weather Updates



CALIFORNIA

Clouds increase Wednesday ahead of a low-pressure system. Morning lows range from mid-30s south of King City to upper 30s–low 50s near the coast, with daytime highs in the mid-50s to mid-60s. Light to moderate showers begin overnight and continue through early Friday, totaling $\frac{1}{4}$ – $\frac{3}{4}$ ". Skies clear Friday, with inland lows in the mid-30s and weekend highs reaching upper 50s–low 70s.



MEXICO

Warmer and mostly dry weather expected, with only isolated light showers. Over the next five days, highs will be mid-70s to mid-80s and lows upper 40s to upper 50s.



FLORIDA

Warm temperatures continue through Sunday, with highs in the upper 70s to mid-80s. Lows will range from the low 50s to near 60 in northern Florida and upper 50s to upper 60s in central and southern Florida. Winds will gust 15–20 mph through Nov. 21 in Southeast Florida and the Tampa Bay area. Dry weather is expected, with only isolated sprinkles.



ARIZONA

Forecast trends wetter for the rest of the week due to two passing cut-off lows. Wednesday's rain will mainly affect central Arizona, with isolated light showers possible in Yuma and Imperial Valleys. Light rain continues in central Arizona Thursday as the next system moves in, bringing showers to southeast California late Thursday and spreading across Arizona Friday. Showers should taper off Saturday evening, with dry conditions Sunday.

Highs cool to the low–mid 60s by Friday, warming to mid-60s–mid-70s by Sunday. Morning lows start mid-40s Wednesday, dropping to mid–upper 40s Thursday, then slowly rising to around 50 by Sunday.

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



Freight Updates

Freight this week sees the challenges of transition from Salinas to Yuma drawing to a close. We do anticipate Friday, November 26th to be the peak of Thanksgiving Holiday pressure and recommend extra focus to ensure trucks are loaded and rolling efficiently. Happy Holidays from the Pro*Fresh Logistics team, we are Thankful for the partnerships, new and old.



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

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

	11/10/25	11/17/25	11/24/25	Change from	
				week ago	year ago
U.S.	3.837	3.868	3.831	▼ -0.037	▲ 0.292
East Coast (PADD1)	3.823	3.856	3.862	▲ 0.006	▲ 0.269
New England (PADD1A)	3.955	4.021	4.057	▲ 0.036	▲ 0.281
Central Atlantic (PADD1B)	3.956	3.999	4.010	▲ 0.011	▲ 0.223
Lower Atlantic (PADD1C)	3.761	3.787	3.789	▲ 0.002	▲ 0.286
Midwest (PADD2)	3.891	3.913	3.850	▼ -0.063	▲ 0.319
Gulf Coast (PADD3)	3.436	3.490	3.459	▼ -0.031	▲ 0.256
Rocky Mountain (PADD4)	3.803	3.813	3.723	▼ -0.090	▲ 0.273
West Coast (PADD5)	4.545	4.559	4.514	▼ -0.045	▲ 0.337
West Coast less California	4.161	4.180	4.108	▼ -0.072	▲ 0.353
California	4.988	4.996	4.983	▼ -0.013	▲ 0.321

*prices include all taxes

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



Crop Updates

December Outlook: Desert Production Improves, Berries Stay Tight, and Holiday Pull Winds Down

As we wrap up November, the desert is finally starting to take shape. After a messy stretch of storms that slowed harvests and complicated load times, fields in Yuma are drying out, plants are responding to the warmer days, and we're seeing the first real signs of stability since transition began.

Iceberg, romaine, and leaf are all showing steady improvement. Weights are still inconsistent, but quality is notably better than the tail end of Salinas, and processors should see more reliable supplies as we move through the first two weeks of December. If the weather continues to cooperate, most growers expect volume and carton weights to normalize by mid-month.

Brussels sprouts will remain a problem well into December. California's coastal acreage is still battling the fallout from heat, rain, and heavy diamondback moth pressure. That combination has created small sizing, seeder, and discoloration, and it continues to limit the amount of usable raw material for value-added programs. Relief is not expected until Mexico begins harvesting in mid-December, with more noticeable improvements showing up in January. Strawberries are going to stay tight through the first half of December. Oxnard is producing light but improving volume, Santa Maria is finished until late December, and Central Mexico is coming on gradually. Baja will begin soon. Florida is slowly increasing, but it will not be a major factor until mid-December. Blueberries should remain in decent shape thanks to Peru and increasing Central Mexico crossings. Blackberries and raspberries look steady with solid supplies out of Baja and Mexico.

We're also seeing challenges in green onions due to significant rain in Mexicali earlier this month. Cooler nights are slowing growth, and supplies will stay snug as we move into December.

For holiday staples like potatoes and onions, quality remains excellent, but freight will continue to be a story. Capacity out of the Northwest historically tightens through the end of the year, and 2025 is no exception. High trucking costs on low FOBs will continue to influence movements into December.

As we head into the final stretch of the year, it's a good time to appreciate the people behind all of this. The crews are working shorter days and longer weeks as the light fades, shipping teams are trying to push trucks out through weather delays, and everyone across the supply chain is showing up day after day during the busiest time of year. Produce is never easy, but the people in this industry make it something to be proud of.



JOEY PIEDIMONTE
SOURCING MANAGER