

The Source

Commodity of the Month - Lemons

MARKET ALERTS

Asparagus: Mexican asparagus supplies remain tight due to weather, reduced crews, and border delays, while strong East Coast demand for Peruvian asparagus keeps markets active.

Brussel Sprouts: Supplies are very limited due to insect pressure, quality issues, and small sizing in Salinas Valley and Oxnard.

Celery: Demand exceeds supply and is expected to remain high this week. Production is from Oxnard/Santa Maria, with Yuma starting later. Large sizes are most available, though pith and seeding are common.

Citrus (Oranges): Navel oranges peak on 88/72/56ct; 113/138ct are tight. Fog and upcoming rain may cause harvest delays and quality issues.

Cucumber: Florida production is low, Honduran imports are light, and Nogales volumes are moderate but demand keeps prices high.

Grapes: The grape market is shifting to imports, with higher prices expected through the holidays; larger January volumes should ease FOBs.

Green Onion: Supplies are tight from recent rains, keeping the market elevated.

Pineapple: Pineapples are stabilizing but remain tight on 8/10-count crownless and organic, with possible substitutions and holiday port delays.

Strawberries: Supplies are increasing, prices easing, and quality remains excellent, with volume deals available through next week.

DECEMBER 17, 2025

CROP UPDATES

As holiday demand eases, winter growing regions are building volume, leading to improved overall produce availability. Lettuce and strawberry supplies are increasing and markets are softening, shifting focus toward quality and execution. A few items, including green onions and Brussels sprouts, remain constrained due to weather and seasonal impacts heading into the post-holiday period. [Read more](#)

WEATHER

California: Light showers early Wednesday; highs 60s–70s, lows 30s–50s. Rain returns Friday into the weekend, ½”–2” expected.

Florida: Warm ahead of front; dry Wed, scattered showers Thu–Fri (0.05–0.2”), then cooler and drier weekend.

Mexico: Cool mornings with patchy frost Thu–Sun; lows 30s–40s, highs 60s–70s. Light showers Thu, then mostly dry.

Arizona: Strong high pressure keeps the Southwest warm; highs mid-70s–low 80s, lows 40s–50s, light variable winds through the weekend.

FREIGHT

Freight this week sees the Christmas holiday arrive. Historically, truck markets become very active, and we expect no less this year. Shipping delays in Yuma combined with lack of truck capacity will create a challenging scenario when it comes to transportation. We encourage advanced bookings, and planning ahead. Friday December 26th will be very difficult to navigate loading in all areas. Be advised

IN PEAK SEASON

- Avocados
- Pears
- Oranges
- Potatoes



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Commodity Updates



Apples

The 2025–2026 Washington apple season continues to take shape, with early projections proving more optimistic than current packing realities. Gala volumes in particular are coming in significantly lighter, with this year's crop running approximately 3 million cases below the same point last season. Pink Lady and Ambrosia are also down, each by about 1 million cases year over year. As a result, pricing on all three varieties is trending upward.

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



Asparagus

ALERT

Mexican asparagus supplies remain tight due to cold weather slowing growth, reduced holiday harvest crews, and border delays. Lower yields and logistical challenges continue to limit availability, while stronger demand for Peruvian asparagus on the East Coast is keeping markets active despite improved supply.

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



Avocados

Markets are steady at lower levels with ample fruit on trees and decreased demand. Minimal harvesting in Mexico next week may impact the market. Aventajada is the main crop, peaking at 48ct and 60ct, with dry matter/oil content in the high 20s to low 30s.

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



Bell Peppers

Green bell peppers are in good supply on both coasts, providing solid overall availability. Red bells remain very limited, with minimal volume moving through the Nogales crossing. Additional supply is expected by early January, which should bring some relief, though prices remain elevated for now.

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

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

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Commodity Updates



Berries (Blackberries)

No changes from last week. Fruit remains in good supply from Baja and Central Mexico, with generally good quality and only occasional red cell issues reported.

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



Berries (Blueberries)

The last of the Peruvian supplies are still en route, while Central Mexico production is steadily increasing and crossing into McAllen, Texas. Quality has been very good, and this trend is expected to continue into January.

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



Berries (Raspberries)

Central Mexico production is leaner due to colder weather, causing markets to firm up.

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



Berries (Strawberries)

ALERT

Strawberry supplies are rising, prices are dropping, and quality remains very good; some volume deals available through next week.

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

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

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Commodity Updates



Broccoli

Broccoli supplies are beginning to tighten this week, with the market expected to move higher heading 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 extremely limited, as the Salinas Valley and Oxnard regions continue to face insect pressure, quality challenges, and smaller sizing.

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



Carrots

Harvest is ongoing in Bakersfield through February, with jumbo sizes slightly smaller due to early entry from recent weather. Sizing is expected to improve, and Grimmway's Georgia program has begun this week with baby peeled, cellos, tables, jumbos, and 2" peeled chunks.

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

Cauliflower supplies are strong across all sizes and growing regions, with the market expected to remain steady into next week.

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



Celery

ALERT

Demand continues to exceed available supplies and is expected to remain so through the week. Current production is coming out of the Oxnard/Santa Maria region, with Yuma expected to begin production toward the end of the year. All value-added items remain escalated. Large sizes offer the best availability, though pith and seeding are being reported as common quality issues.

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

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

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Commodity Updates



Citrus (Grapefruit)

Red Rios are available, peaking at 48-count, with shipments coming from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

Markets are improving as increased harvests from District 1 (San Joaquin Valley) help boost overall supply. District 3 (CA Desert/AZ) remains the main growing region, with peak sizes at 140ct, 115ct, and 165ct. Mexican fruit is also available, so for South Texas loads, please feel free to reach out.

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)

Mexican harvest is declining, tightening supplies and lowering yields. Strong holiday and winter demand is pushing prices higher. Market expected to stay active through March/April.

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



Citrus (Oranges)

ALERT

Navel oranges are peaking on 88/72/56ct, while 113/138ct fruit is tight due to recent weather speeding up sizing. Small fruit will remain limited with strong markets. Persistent Central Valley fog is causing damp fruit, harvest delays, and potential quality issues, with heavy rain expected next week further impacting harvesting.

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



Cucumber

ALERT

Florida production is minimal due to cool weather impacts. Honduran imports are light. Nogales has moderate volume but higher demand keeping prices high.

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

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

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Commodity Updates



Eggplant

East Coast supplies are tightening due to cooler weather in South Florida. Mexican volumes are gradually increasing, though sizing remains mixed during the transition. Overall quality is good, with smaller fruit more common than 24-count cartons.

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



Garlic

The California garlic crop is progressing well with good quality, while Mexican supplies continue to supplement the harvest.

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 completing its transition from domestic to imported fruit. Domestic green grapes are nearly finished, with imports now arriving on both coasts. Prices for imported reds and greens are significantly higher than late-season domestic fruit and are expected to remain elevated through the holidays into January. As larger volumes arrive in mid-January, FOBs are expected to ease back toward normal seasonal levels.

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 remain very tight due to recent rains reducing yields. The market is expected to stay elevated into next week.

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



Kale

Kale supplies and quality remain solid, 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 for this commodity has slowed and is expected to remain light throughout the week. Elevated pricing on value-added items is likely to ease. Overall quality is good, with weights averaging 38-44 pounds depending on the supplier. With no rain in the forecast and the approach of Christmas, excess product is common. Shippers are flexible, so this is a good opportunity to promote the commodity.

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



Lettuce Leaf

Expect good supplies of romaine, as well as green and red leaf, throughout the week. Butter lettuce will remain limited. Value-added romaine is expected to fall off triggers by midweek, while romaine hearts should remain steady. Quality across all leaf items is reported as above average, supported by warm, dry weather and lighter market demand.

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



Lettuce Tender Leaf

Supplies and quality of tender leaf items are improving, with similar conditions expected to continue while favorable weather holds.

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



Melon (Cantaloupe)

The Westside deal is complete, with offshore and Mexican cantaloupes now available. Offshore cantaloupe pricing is expected to remain steady through the weekend but will be tight during the holidays due to vessel delays and lower yields entering the U.S. Mexican cantaloupes are very limited as the market transitions from Northern to Southern Mexico fruit.

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

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

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Commodity Updates



Melon (Honeydew)

Offshore and Mexican honeydews are available. Offshore honeydew prices are elevated due to vessel delays and lower U.S. yields, while Mexican honeydews will remain limited as the market transitions from Northern to Southern Mexico for the remainder of the year.

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

Domestic watermelons are finished, with prices steady as Mexican watermelons from Nogales supply the Midwest and East Coast. Limited volumes are available from Mexico via Texas and Nogales, impacted by last month's rain. Offshore watermelons are also available in limited supply.

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

Supplies are improving following the holiday demand.

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

Onions are currently available from WA, ID, and UT, with strong domestic demand. Prices are expected to rise as demand continues. All product is in storage, and weather in Idaho may impact trucking. Transportation will largely drive the market for the remainder of the year, with reefer and rail preferred due to conditions, while flatbed shipments are not recommended.

Commodity/Region	Supply	Price	Quality
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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 continues in a steady rhythm—Anjous, Bartletts, Boscs, and Reds moving consistently. Production is strong, perhaps even abundant, with ample foodservice sizes available. Warehouses are stacked high, offering a reassuring sense of order and plenty in an otherwise unpredictable market.

Commodity/Region	Supply	Price	Quality
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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

The pineapple market is starting to stabilize but remains tight on 8- and 10-count crownless pineapples as well as organic fruit. Expect potential substitutions, order cancellations, and changes. Holiday-related port delays are also likely.

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

Potato supplies are strong for the holidays, though smaller counts remain tight. Burbanks and Norkoths are available, with mid-size WA potatoes in good quality. Colored potatoes and new crop sweet potatoes from CA and NC are also available. Trucking is driving the market.

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



Squash

Zucchini supplies are strong on both coasts, with promotable volumes available. Yellow squash also has good availability, with options from Florida, Nogales, and McAllen.

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



Stone Fruit

Pomegranates, persimmons, and pineapple quince are nearly finished for the season and should wrap up by Christmas. Domestic Asian pears remain available, while the domestic kiwi market is steady at higher prices. Imported peaches and nectarines are expected on both coasts in about two weeks.

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

Florida romas have good supply and quality. Central Mexico is light due to a late start in Culiacán. Round tomatoes are steady on both coasts with good supply. Mexican grapes from Culiacán are transitioning, with peak volumes expected in 2-3 weeks.

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

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

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Weather Updates



CALIFORNIA

A slight chance of showers north of Soledad and spotty drizzle elsewhere is expected early Wednesday, with additional rain totals under 0.1 inch. Morning lows will range from the mid-30s to mid-40s south of King City and low 40s to low 50s near the coast, with daytime highs in the low 60s to mid-70s. The first of two systems arrives Friday, bringing a weekend chance of rain with totals between ½" and 2".



MEXICO

Mornings will cool with a chance of light, patchy frost from Thursday through Sunday. Lows will be in the low-to-upper 40s Wednesday morning and mid-30s to low 40s Thursday through Sunday, with highs in the mid-60s to mid-70s. Showers will be light and isolated through Thursday, with mostly dry conditions expected for the latter half of the week and through the weekend.



FLORIDA

Temperatures will warm as a front approaches. Wednesday will be dry, followed by isolated to scattered showers Thursday into Friday, with most rainfall totals between 0.05" and 0.20" statewide. Drier and cooler conditions are expected over the weekend.



ARIZONA

A strong high-pressure system remains over the deep Southwest, keeping temperatures well above normal into next week. Highs will stay in the mid-70s to low-80s in most valleys, with morning lows in the 40s to low 50s. Light northerly winds Wednesday and Thursday will shift to light southerlies by Friday evening, then become light and variable through the weekend.

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



Freight Updates

Freight this week sees the Christmas holiday arrive. Historically, truck markets become very active, and we expect no less this year. Shipping delays in Yuma combined with lack of truck capacity will create a challenging scenario when it comes to transportation. We encourage advanced bookings, and planning ahead. Friday December 26th will be very difficult to navigate loading in all areas. Be advised



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

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

	12/01/25	12/08/25	12/15/25	Change from	
				week ago	year ago
U.S.	3.758	3.665	3.607	↓ -0.058	↑ 0.113
East Coast (PADD1)	3.785	3.729	3.703	↓ -0.026	↑ 0.128
New England (PADD1A)	4.049	4.040	4.064	↑ 0.024	↑ 0.310
Central Atlantic (PADD1B)	3.982	3.948	3.944	↓ -0.004	↑ 0.183
Lower Atlantic (PADD1C)	3.687	3.617	3.580	↓ -0.037	↑ 0.093
Midwest (PADD2)	3.755	3.635	3.567	↓ -0.068	↑ 0.117
Gulf Coast (PADD3)	3.415	3.327	3.267	↓ -0.060	↑ 0.077
Rocky Mountain (PADD4)	3.665	3.498	3.385	↓ -0.113	↑ 0.028
West Coast (PADD5)	4.441	4.370	4.294	↓ -0.076	↑ 0.164
West Coast less California	4.026	3.944	3.871	↓ -0.073	↑ 0.145
California	4.919	4.862	4.781	↓ -0.081	↑ 0.184

*prices include all taxes

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



Crop Updates

Winter Volume Builds as Holiday Demand Tapers

As the industry heads into Christmas week, markets are settling into a familiar late-December pattern. Holiday demand is beginning to wind down while winter growing regions continue to build volume, creating generally good supplies across most categories, with a few exceptions. With improved overall availability, the focus is shifting toward execution and quality.

Lettuce supplies continue to build across the Arizona-California desert region as favorable growing conditions support increased production. Iceberg, romaine, and green leaf volumes have all picked up over the past week, easing markets and improving overall availability. Quality is generally good, though lighter weights remain common as many growers entered fields early to meet Thanksgiving demand. Warmer desert temperatures are expected to support continued growth and help weights improve as the season progresses. Southeast production is beginning to ramp up and should provide additional coverage into early spring. Mexican iceberg and romaine continue to ship steadily, with good quality and favorable weights reported.

Strawberry production is trending higher as multiple regions contribute simultaneously. Mexico and South Texas volumes are increasing daily, while Florida continues to harvest despite some weather-related slowdowns. In California, Santa Maria and Oxnard are recovering from earlier storms, with limited harvests underway as fruit continues to color. Quality remains variable depending on origin. Mexico and Florida have reported white shoulders, green tips, and occasional bruising, while California fruit has shown some pin rot and green shoulders. Berry counts are generally running in the low- to mid-20s per 8/1 clamshell. As volume builds, markets across all growing regions have softened, opening the door for increased promotional activity heading into year-end.

While overall supply is improving, a few items remain challenged heading into the end of December. Green onion availability remains tight as desert growing regions recover from recent rainstorms and intermittent border delays. Wet field conditions in the Mexicali region have slowed harvests and reduced yields, while labor constraints through the holiday season continue to limit production. Quality has ranged from fair to average, with some lots showing increased susceptibility to decay due to earlier wet conditions. Pricing is expected to remain elevated.

Brussels sprouts remain one of the most constrained items in the market. The Salinas season is entering its final weeks, and recent heat and rain have significantly impacted yields and quality. Supplies in the Arizona-California desert region are expected to remain very limited through December, with small sizing, discoloration, and puffiness prevalent. Larger sizes remain particularly difficult to source. Mexican production is expected to begin late this month, with more meaningful volume anticipated in early January, providing some relief after the first of the year.

Heading into Christmas, volume continues to build across lettuces and strawberries, while a handful of row-crop items remain limited. As holiday demand slows, this week's market will be less about availability and more about managing quality, timing, and expectations ahead of the post-holiday reset.

JOEY PIEDIMONTE
SOURCING MANAGER

