

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.

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.

IN PEAK SEASON

- Avocados
- Pears
- Oranges
- Potatoes

DECEMBER 24, 2025

CROP UPDATES

Weather disruptions are returning ahead of Christmas, with rain affecting California, the desert, and parts of Mexico, creating short-term harvest and loading challenges. Despite this, desert lettuce quality is improving and broader supply conditions are expected to rebound after the holiday as fields dry, additional regions contribute volume, and demand softens. [Read more](#)

WEATHER

California: Wet, windy low Tuesday–Wednesday with SE gusts to 50 mph and ½”–1¼” rain; slow-moving system Wed–Sat brings 1½”–4” rain and similar winds.

Mexico: Mostly dry through the weekend; highs mid-60s–mid-70s, lows low 40s–low 50s.

Florida: Seasonal to slightly above-normal temps with mostly dry weather; winds 18–25 mph Tue, ~20 mph Wed–Thu in SE Florida.

Arizona: Low west of SF Bay brings spotty rain Tue–Wed to SE California and Arizona, heavy showers Wed afternoon, tapering Thu–Fri.

FREIGHT

Freight this week sees increased demand for abbreviated loading to circumvent the Christmas holiday. With an anticipated bottleneck in Yuma growing region on 12/26 suggesting early bookings and expected loading delays



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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

Peru is filling the Mexico gap with rising volumes, mostly smaller sizes shipped by ocean, while Mexican supply is tight with sharply higher prices and minimal large sizes as production winds down before a delayed Sonora ramp-up.

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



Avocados

Markets are holding steady at lower levels, supported by ample fruit on the trees and softer demand. Harvesting in Mexico will be minimal this week due to the holiday, so market response will depend on the reduced supply. Aventajada remains the primary crop currently being harvested and shipped, with peak sizes at 48ct and 60ct and 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

Red bell supplies remain tight with mixed quality and weather impacts keeping prices elevated, while strong green bell availability on both coasts is driving lower prices. Red markets are expected to stay high in the short term, with green markets remaining favorable through the holiday.

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)

With holiday demand easing, adequate supplies from Central Mexico are available to comfortably fill orders.

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



Berries (Blueberries)

We are currently in a brief gap on offshore fruit, with Peruvian supplies nearing the end and Chilean volumes beginning to ramp up. At the same time, rising production out of Central Mexico is helping keep the market stable.

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



Berries (Raspberries)

Production out of Central Mexico has declined due to inclement weather, leading to firmer markets across all distribution points.

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



Berries (Strawberries)

Strawberries remain plentiful across all growing regions, with holiday demand keeping markets flat. Forecasted rain in California this week is expected to disrupt harvesting into next week, so we recommend utilizing Texas and Florida loading options over the next 7 to 10 days.

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

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

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Commodity Updates



Broccoli

Broccoli supplies remain somewhat tight, though the market is expected to ease heading into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	Steady	\$\$\$	Fair
Yuma, Arizona (November - May)	Steady	\$\$\$	Fair



Brussel Sprouts

ALERT

Brussels sprout supplies remain extremely limited, with Salinas Valley and Oxnard regions facing insect pressure, some decay, 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 underway in Bakersfield and will continue through February. Jumbo sizes are slightly smaller than usual due to an early start prompted by recent inclement weather, but sizing is expected to improve as the season progresses. Grimmway's Georgia program has also begun this week, offering 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 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

The market is soft, though pricing varies between \$20-\$30 depending on the supplier. Southern California remains the most available source, with Yuma production expected after Christmas into the New Year. Value-added items continue to see price increases. Large sizes remain most readily available, with minimal pith and seeder defects reported.

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 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)

Markets are improving as increased harvests from District 1 (San Joaquin Valley) boost overall supply. District 3 (CA Desert/AZ) remains the main growing region, with peak sizes at 140ct, 115ct, and 165ct. Mexican production is also active, so contact us for South Texas loading needs.

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)

Lime markets are firm as the current crop winds down and No. 1 availability tightens. Prices are expected to rise through January and possibly February due to declining yields and steady demand. Sizing will vary, with larger fruit currently and smaller fruit increasing, and some transit-related defects are possible from weather impacts.

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 accelerating sizing. Small fruit is expected to remain limited, keeping markets strong. Persistent Central Valley fog and upcoming heavy rain are creating harvest challenges, increasing moisture, bruising, and potential decay, though growers are applying maximum protective treatments.

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



Cucumber

ALERT

Florida production is minimal due to cool weather, Honduran imports remain light, and Nogales has moderate volume with steady demand keeping prices stable.

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 from cooler South Florida weather. Mexican volumes are gradually increasing, though sizing is 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 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 transitioning from domestic to imported fruit, with imports now arriving on both coasts. Imported reds and greens are priced well above final domestic levels, a trend expected through the holidays. Larger volumes arriving in mid-January should bring prices 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 lowering yields, and the market is expected to stay strong 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 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 dropped significantly, leading shippers to offer more flexibility. Value-added items are no longer escalating, with Yuma averages at 39–44 pounds and overall quality above average. With the Christmas holiday approaching, expect sharp offers this week—promote aggressively.

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



Lettuce Leaf

Romaine supplies in Yuma are strong and expected to continue into the new year. Shippers are flexible due to lower demand. Green and red leaf lettuce will have above-average availability, and all leaf items except butter are good for promotion. Value-added leaf items are off escalation for the holidays.

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



Lettuce Tender Leaf

Tender leaf supplies and quality continue to improve, with similar conditions expected as long as the favorable weather persists.

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. Offshore and Mexican cantaloupes are available, though offshore pricing is elevated due to lower yields and vessel delays, with holiday port schedules adding further impact. Mexican cantaloupes remain very tight during the transition from Northern to Southern Mexico, with light supplies expected until the new year.

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, with offshore prices elevated due to vessel delays and lower yields. Mexican supplies remain limited during the transition from Northern to Southern Mexico for the rest of the year.

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



Melon (Watermelon)

Domestic watermelons are finished, with prices steady. Mexican watermelons from Nogales supply the Midwest and East Coast, while limited volumes are available from Texas and Nogales. Offshore watermelons are also entering the U.S. in limited supply.

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



Mushroom

Supplies are improving following the holiday demand.

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



Onions

Onions are available in WA, ID, and UT, with strong U.S. demand supporting upward pricing pressure. All product is in storage, and market conditions will be driven by weather and trucking. Reefer and rail are preferred for transport, while flatbeds are not recommended due to weather concerns.

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 is steady across all varieties, including Anjous, Bartletts, Boscs, and Reds. Production is strong with ample availability, especially in foodservice sizes, making pears highly promotable compared to larger apples.

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

The pineapple market is stabilizing but remains tight on 8 & 10ct Crownless and organic pineapples. Expect substitutions, order cancellations, and changes, with holiday-related port delays continuing through the end of 2025.

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, with sheds ready to make deals. Smaller counts are tight, Burbank and Norkoth varieties are available, and retailers are increasing orders for the rest of the year. WA potatoes offer great quality, peaking on mid sizes, while large and small counts remain snug. Color potatoes are available, and trucking continues to drive the market. New crop sweet potatoes from CA and NC are also available.

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

Good supply of zucchini on both coasts. Promotable volume available. Yellow also has good availability. Options in Florida, Nogales, and Mcallen.

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

Pomegranates, persimmons, and pineapple quince are nearly finished for the season, expected to 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 to arrive 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

Roma Tomatoes: Florida transitioning, Mexico improving with strong quality; West Mexico volumes up in January. McAllen lower-priced, fair Central MX quality. **Round Tomatoes:** South Florida steady, supported by Naples and rising Mexican supply. **Grape Tomatoes:** Steady supplies with good Florida quality and consistent Mexican shipments.

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

A wet, windy low moves in Tuesday with light to moderate showers, increasing to moderate-heavy overnight, tapering early Wednesday. SE winds may gust up to 50 mph. Temps: mornings upper 30s–mid 50s, highs upper 50s–mid 60s. Rain totals: $\frac{1}{2}$ "– $1\frac{1}{4}$ " by early Wednesday. A slow-moving system follows Wednesday through early Saturday with moderate-heavy rain, gusts up to 50 mph, and totals of $1\frac{1}{2}$ "–4".



MEXICO

Mostly dry through the weekend with a few isolated showers. Highs mid-60s to mid-70s midweek; morning lows dropping to the low 40s–low 50s by the weekend.



FLORIDA

Temperatures will remain steady, seasonal to slightly above normal, through the weekend. Mostly dry weather is expected over the next five days, with winds gusting 18–25 mph Tuesday and around 20 mph Wednesday–Thursday across southeast Florida.



ARIZONA

A deepening low west of the SF Bay will bring southerly flow over southeast California and Arizona, causing spotty moisture Tuesday afternoon. Light rain is possible in Yuma County and west-central Arizona, spreading to Coachella Valley early Wednesday and into Imperial Valley by sunrise. Southeast California may see heavy showers and thunderstorms Wednesday afternoon, with Yuma getting a brief break until late Thursday. Rain coverage should steadily decrease Thursday evening in Arizona and remain spotty in southeast California Friday.

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



Freight Updates

Freight this week sees increased demand for abbreviated loading to circumvent the Christmas holiday. With an anticipated bottleneck in Yuma growing region on 12/26 suggesting early bookings and expected loading delays



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

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

	12/08/25	12/15/25	12/22/25	Change from	
				week ago	year ago
U.S.	3.665	3.607	3.544	↓ -0.063	↑ 0.068
East Coast (PADD1)	3.729	3.703	3.674	↓ -0.029	↑ 0.106
New England (PADD1A)	4.040	4.064	4.047	↓ -0.017	↑ 0.290
Central Atlantic (PADD1B)	3.948	3.944	3.892	↓ -0.052	↑ 0.129
Lower Atlantic (PADD1C)	3.617	3.580	3.557	↓ -0.023	↑ 0.081
Midwest (PADD2)	3.635	3.567	3.483	↓ -0.084	↑ 0.034
Gulf Coast (PADD3)	3.327	3.267	3.214	↓ -0.053	↑ 0.060
Rocky Mountain (PADD4)	3.498	3.385	3.304	↓ -0.081	↓ -0.024
West Coast (PADD5)	4.370	4.294	4.205	↓ -0.089	↑ 0.126
West Coast less California	3.944	3.871	3.766	↓ -0.105	↑ 0.121
California	4.862	4.781	4.711	↓ -0.070	↑ 0.131

*prices include all taxes

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



Crop Updates

Weather Returns as the Desert Crop Finds Its Stride

Weather is back in focus heading into Christmas week, and the timing is less than ideal. A series of rain events is forecast across coastal California, Baja, and parts of the Arizona desert, while cooler temperatures continue to linger in Mexico and Florida. None of these systems are extreme on their own, but with holiday schedules, lighter labor, and already tight supply chains, even modest weather can create outsized disruptions.

Santa Maria and Oxnard are expected to see several days of rain into the weekend. The desert is also on the radar, with scattered showers expected, particularly in Coachella, with lighter totals in Yuma. Muddy conditions will affect harvesting and loading, and rain-related issues such as mildew pressure, dirt in packs, and shortened shelf life may surface in both commodity and value-added items.

Despite that, iceberg, romaine, and green leaf quality continue to improve in the desert. Product coming out of Yuma is showing stronger structure and better shelf life, with weights steadily increasing. Rain may temporarily slow progress, but once fields dry out, availability should rebound quickly. Overall, the desert crop is setting up well.

Spring mix and baby leaf remain more sensitive. Arugula continues to be the tightest item, and moisture will create inconsistent yields. Newer lots are showing improved color and texture, but supplies remain snug with little excess available.

Strawberry production is still light in Santa Maria and Oxnard, and additional rain will further delay harvests and slow fruit maturity. Baja and Central Mexico are increasing crossings and helping balance the market, while Florida continues to produce steady volumes with gradual improvement expected into January. Softer demand is helping absorb some of the supply pressure without creating major volatility.

Oxnard remains the primary celery growing region this time of year. While celery tolerates moisture better than most crops, saturated soils make it difficult to move heavy product out of the fields. Expect intermittent harvest delays and uneven loading schedules until conditions improve.

Brussels sprouts remain extremely tight heading into the holiday and are expected to stay that way into January, particularly for value-added packs. Recent rain, prior heat stress, and insect pressure have compromised raw product integrity, limiting pack-outs and shortening shelf life. Even as demand eases after Christmas, supplies will remain constrained until additional southern production comes online.

While weather will create short-term challenges this week, the broader outlook is improving. Desert production is gaining strength, Mexico and Florida are contributing more volume, and demand typically softens between Christmas and New Year's. Once fields dry out, availability should ease and load times should improve as we close out the year. As we head into the holidays, it's worth recognizing that this industry runs on people. From the fields to the sheds to the trucks and offices, it's the commitment of those teams that keeps food moving under tough conditions. It's been a challenging season, and we're thankful for everyone who makes it work.

JOEY PIEDIMONTE
SOURCING MANAGER

