

The Source

Commodity of the Month - Strawberries

MARKET ALERTS

Apples: Washington apples favor larger sizes; small fruit, especially Gala and Granny Smith, is scarce. Shift to 100s and 113s; shortage continues until fall.

Asparagus: Mexican asparagus is tight, demand slow but trade covers shortfalls. Prices high; market steady through Valentine's Day.

Bell Peppers: Florida peppers hit by freeze; Mexican supply softens impact, but green pepper prices likely rising through March.

Broccoli: Broccoli supplies tighten, prices rising due to late-season planting gaps.

Carrots: Southern San Joaquin carrots delayed; tight supply 2-3 weeks. Prices rising; 72-hour lead time recommended.

Citrus (Oranges): California Navels favor large sizes; small fruit limited. Shift to 72/88ct, 4-5 day lead time needed.

Eggplants: Florida eggplant done; Mexico limited, prices high, supply tight through mid-March.

Lettuce (Iceberg): Iceberg lettuce light, prices high, quality variable; market volatile through February.

Melon (watermelon): Mexican watermelon prices high, demand slightly lower. Florida offshore available; Nogales through April. Personal/mini seedless better supplied.

Pineapple: Pineapples stable but tight; larger sizes rising late Feb. Crowned 6-7 up, 8 steady; crownless/organic tight. Ports clear this week.

Squash: Florida squash down; demand shifts to Mexico. Prices high through mid-March.

Tomatoes: Tomato prices rising from Florida freeze; Mexican supply offsets short-term. Tight supplies expected March-April.

Strawberries: Valentine's Day demand peaks through next week. West Coast up, Central Mexico light, Florida recovering from freeze.

FEBRUARY 4, 2026

CROP UPDATES

Cold weather dominates most growing regions, but signs of spring are emerging. Florida and parts of Mexico remain below normal, while California's coast stays dry. Strawberry supplies are tight — Florida yields are limited by near-freezing nights, while California and Baja are transitioning into spring fruit with improving quality. Tender leaf greens and desert row crops remain snug, with arugula especially tight and broccoli supplies constrained. Overall, winter conditions persist, keeping markets tight as Valentine's Day demand rises. [Read more](#)

WEATHER

California: Offshore flow brings above-average temps through Thursday, with lows in the 30s-50s and highs in the 70s-80s. High pressure weakens Thursday, shifting winds onshore, keeping lows similar but highs dropping to the 60s-70s.

Mexico: Cool mornings and warm days through the weekend, mostly dry. Lows 30s-40s, highs 60s-70s, warming slightly over the weekend.

Florida: Slight frost possible Wednesday in N/C Florida, easing Thursday. Isolated showers Wed-Thu. Cooler Friday increases frost risk; weekend milder. Winds 15-25 mph.

Arizona: Warmer-than-normal through the period, highs 80s-90s, cooling slightly by weekend. Lows 40s-50s. Winds gust 20 mph Wed, easing and turning southerly by Friday.

FREIGHT

Freight this week sees some fresh items from Yuma in short supply creating shipper delays thus holding trucks. As mentioned in the past, advanced bookings and calculated loading dates are important for ensuring truck loading times and shipper availability is intersected.

PRO*FRESH
LOGISTICS

IN PEAK SEASON

- Apples
- Oranges
- Avocados
- Pears
- Potatoes

Table of Contents



[Apples](#)



[Citrus \(Grapefruit\)](#)



[Melon \(Cantaloupe\)](#)



[Asparagus](#)



[Citrus \(Lemon\)](#)



[Melon \(Honeydew\)](#)



[Avocados](#)



[Citrus \(Limes\)](#)



[Melon \(Watermelon\)](#)



[Bell Peppers](#)



[Citrus \(Oranges\)](#)



[Mushroom](#)



[Berries \(Blackberries\)](#)



[Cucumbers](#)



[Onions](#)



[Berries \(Blueberries\)](#)



[Eggplant](#)



[Pears](#)



[Berries \(Raspberries\)](#)



[Garlic](#)



[Pineapples](#)



[Berries \(Strawberries\)](#)



[Grapes \(Green/Red\)](#)



[Potatoes](#)



[Broccoli](#)



[Green Onions](#)



[Squash](#)



[Brussel Sprouts](#)



[Kale](#)



[Stone Fruit](#)



[Carrots](#)



[Lettuce Iceberg](#)



[Tomatoes](#)



[Cauliflower](#)



[Lettuce Leaf](#)



[Celery](#)



[Lettuce Tender Leaf](#)

Commodity Updates



Apples

ALERT

Ideal pre-harvest weather drove the Washington apple crop toward larger sizes, while poor pack-outs have resulted in an acute shortage of small fruit, particularly for bagged retail and 125/138 foodservice packs. Gala and Granny Smith are the most impacted. Buyers are encouraged to transition to 100s and 113s, as this size imbalance is expected to continue until the new crop arrives in the fall.

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



Asparagus

ALERT

Mexican asparagus supplies are tight as production in San Luis, Mexicali, and Caborca starts slowly. While open-market demand is sluggish, shipper-to-shipper trading is absorbing most volume to cover shortfalls. With Peruvian stock cleared from the West Coast and supplemental regions winding down, FOB prices remain elevated and the market is expected to stay flat through Valentine's Day.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Light	\$\$\$	Fair
Peru (Year Round)	Steady	\$\$\$	Fair
Mexico (November - May)	Light	\$\$\$	Fair



Avocados

Markets are holding steady for 40ct and 48ct sizes, while 70s are seeing a slight price increase as peak sizing shifts. Harvesting is currently centered on the Aventajada crop, which is showing excellent maturity with dry matter and oil content in the low 30s.

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



Bell Peppers

ALERT

Florida peppers have sustained significant freeze damage, with the resulting market impact expected to intensify over the coming days and persist through March. While heavy Mexican production is currently keeping the market soft, it will not be enough to fully offset Florida's losses. A major reset in the green pepper market is imminent, making aggressive ad pricing a significant risk.

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

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

Supply Partners



Commodity Updates



Berries (Blackberries)

Supply levels remain unchanged from last week's update, with steady volume continuing to cross from Mexico through Texas.

Commodity/Region	Supply	Price	Quality
------------------	--------	-------	---------

California (Year Round)	Steady	\$\$\$	Good
----------------------------	--------	--------	------



Berries (Blueberries)

Supply is currently being drawn from Chile, Central Mexico, and California. Market conditions remain firm and steady across all loading points, including California, Texas, Florida, and New Jersey. Quality across the board continues to be strong.

Commodity/Region	Supply	Price	Quality
------------------	--------	-------	---------

California (Year Round)	Steady	\$\$\$	Good
----------------------------	--------	--------	------

Dover, Florida (Year Round)	Steady	\$\$\$	Good
--------------------------------	--------	--------	------

McAllen, Texas (Year Round)	Light	\$\$\$	Good
--------------------------------	-------	--------	------



Berries (Raspberries)

Market conditions remain steady, supported by consistent supplies from Baja and Central Mexico. Quality continues to be strong across all arrivals.

Commodity/Region	Supply	Price	Quality
------------------	--------	-------	---------

California (Year Round)	Steady	\$\$\$	Good
----------------------------	--------	--------	------

McAllen (October - May)	Steady	\$\$\$	Good
----------------------------	--------	--------	------



Berries (Strawberries)

ALERT

We are currently in the peak of the Valentine's Day pull, which is expected to continue through next week. West Coast production is increasing steadily thanks to ideal weather conditions, while Central Mexico is experiencing lighter volume due to adverse weather and isolated quality concerns. Meanwhile, Florida has been impacted by a multi-day hard freeze, with a recovery in the region not anticipated until next week.

Commodity/Region	Supply	Price	Quality
------------------	--------	-------	---------

California (Year Round)	Steady	\$\$\$	Fair
----------------------------	--------	--------	------

McAllen (November - May)	Light	\$\$\$	Good
-----------------------------	-------	--------	------

Dover, Florida (Year Round)	Light	\$\$\$	Poor
--------------------------------	-------	--------	------

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

Supply Partners

Driscoll's
Only the Finest Berries™



PRO*ACT
CONNECTING FARMS | EMPOWERING KITCHENS™

Commodity Updates



Broccoli

ALERT

Broccoli supplies continue to tighten this week, with the rising market reflecting the limited availability. Expect pricing to climb gradually heading into the weekend. These elevated markets are the direct result of planting gaps caused by the significant rain events in late November and early December.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	Light	\$\$\$	Fair
Yuma, Arizona (November - May)	Light	\$\$\$	Fair



Brussel Sprouts

Brussels sprout supplies remain limited, though availability is beginning to show signs of improvement. In the Oxnard region, growers continue to manage challenges including insect pressure, some decay, and a smaller size profile.

Commodity/Region Supply Price Quality

Mexico (December-August)	Light	\$\$\$	Fair
Oxnard / Salinas, CA (May - July) (July-Dec)	Light	\$\$\$	Fair



Carrots

ALERT

Southern San Joaquin carrot harvests face significant delays following two months of poor weather and recent heavy rains. Saturated fields have halted equipment, and yields are expected to suffer, keeping supplies tight for the next 2-3 weeks until the Imperial Valley transition in mid-to-late February. While value-added items remain available, commodity prices are rising. To ensure coverage, a minimum 72-hour lead time is strongly recommended.

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 remain tight this week, with the market edging higher. This upward pressure is driven by reduced harvest volumes, a direct result of the planting disruptions caused by the November and December rains.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Steady	\$\$\$	Fair
Santa Maria, California (Year Round)	Steady	\$\$\$	Fair
Yuma, Arizona (November - May)	Light	\$\$\$	Fair



Celery

Like most row crops, the celery market has tightened. While all sizes remain available for shipping from Yuma and Southern California, small sizing currently offers the best availability. Quality remains above average industry-wide, though escalated pricing is now in effect for all value-added items.

Commodity/Region Supply Price Quality

Oxnard, California (Year Round)	Steady	\$\$\$	Good
------------------------------------	--------	--------	------

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

Supply Partners



Commodity Updates



Citrus (Grapefruit)

Star Ruby grapefruit are currently available, peaking on 48ct. Shipments are originating from both Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

Market conditions are improving as increased harvesting in District 1 (San Joaquin Valley) bolsters overall supplies. District 3 (CA Desert/AZ) remains the primary growing region, with volume peaking on 140ct, 115ct, and 165ct. With Mexican production also underway, fruit is available for loading in South Texas upon request.

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)

Supplies remain steady from Mexico, Colombia, and Peru, with sizing currently skewing small, though larger fruit is gradually increasing out of Mexico. Overall quality is fair, as some disease pressure is impacting both appearance and shelf life. Expect ongoing price and size volatility through March as the new crop progresses.

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



Citrus (Oranges)

ALERT

The California Navel crop is heavily skewed toward larger fruit (56ct/72ct), leaving small sizes (113ct/138ct) extremely limited through May. To ensure coverage, flexibility is required; expect substitutions to larger Navels or Cara Caras. Suppliers are strictly enforcing contract averages, and markets remain elevated on small fruit and all grades. Please advise schools and DOD programs to shift to 88ct or 72ct. A 4-5 day lead time is critical, as short-notice orders will be subject to availability.

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



Cucumber

Mexican cucumbers are driving the market as favorable weather supports increasing production and steady demand. In contrast, Florida is effectively finished following recent freezes, and limited Honduran arrivals are largely committed to contracts, leaving spot supplies at a premium. Overall markets remain firm due to tight availability outside of Mexico.

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

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

Supply Partners

Sunkist FRESH LINK

PRO*ACT
CONNECTING FARMS | EMPOWERING KITCHENS™

Commodity Updates



Eggplant

ALERT

Florida eggplant production is effectively finished until late March, leaving Mexico as the sole primary source. Recent weather has limited Mexican output, resulting in an active market with elevated pricing. While supply may improve slightly ahead of Lent, demand is projected to outpace availability, keeping markets firm through mid-March.

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, while Mexican supplies continue to supplement the California 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

Imported red and green grape supplies have improved on both coasts, with the market adjusting to reflect the increased availability. Pricing remains mostly steady.

Grapes (Green)

Commodity/Region	Supply	Price	Quality
	Steady	\$\$\$	Good

Grapes (Red)

Commodity/Region	Supply	Price	Quality
	Steady	\$\$\$	Good



Green Onions

Green onion supplies remain very tight but are beginning to show slight improvement. Recent rains and cool weather have reduced overall yields, keeping the market firm. Expect availability to remain steady as conditions continue to slowly stabilize heading into next week.

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



Kale

Kale supplies are expected to be plentiful through next week, with good quality reported across the growing regions. Expect these steady conditions to persist as the market remains stable.

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

Supply Partners



Commodity Updates



Lettuce Iceberg

ALERT

The iceberg lettuce market remains highly active, with volatility expected to persist well into February. Supplies are forecast to stay light for at least the next few weeks due to limited production and marginal yields. Consequently, escalated pricing is in effect across the board for all value-added items. Current reports indicate head weights ranging between 34-40 pounds, with some shippers noting quality issues such as misshapen heads and outer discoloration.

Commodity/Region Supply Price Quality

Santa Maria, California (March-December)	Light	\$\$\$	Fair
---	-------	--------	------

Salinas, California (May - October)	Light	\$\$\$	Fair
--	-------	--------	------



Lettuce Leaf

The market for all leaf items remains active, though value-added romaine, green leaf, and red leaf products have not yet reached escalated pricing tiers. Quality is strong, with favorable weights and consistent sizing reported across the category. Butter lettuce supplies are currently moderate, while romaine hearts are expected to maintain steady production throughout the week.

Commodity/Region Supply Price Quality

Salinas, California (May - October)	Steady	\$\$\$	Fair
--	--------	--------	------



Lettuce Tender Leaf

Tender leaf items, including spinach, cilantro, and arugula, remain tight due to previous quality issues and lower yields. While supplies will stay limited through this week, expect slight improvements in both quality and volume as we head into next week.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Steady	\$\$\$	Good
------------------------	--------	--------	------

Oxnard, California (Year Round)	Light	\$\$\$	Fair
------------------------------------	-------	--------	------

Yuma, Arizona (November - May)	Light	\$\$\$	Fair
-----------------------------------	-------	--------	------



Melon (Cantaloupe)

Domestic harvests in the Westside and Nogales are finished, shifting the focus to offshore supplies available on both coasts and in Texas. While pricing has stabilized due to steady demand, a natural dip in volume is expected from February 9 through February 16 as growers transition between regions in Central America.

Commodity/Region Supply Price Quality

Central America (December - May)	Steady	\$\$\$	Good
-------------------------------------	--------	--------	------

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

Supply Partners



Commodity Updates



Melon (Honeydew)

Offshore and Mexican honeydews are available. Offshore honeydew pricing has stabilized due to vessel delays and lower yields entering the U.S., while Mexican honeydews are offering stronger supplies.

Commodity/Region	Supply	Price	Quality
------------------	--------	-------	---------

Arizona (June-July) (October-November)	Steady	\$\$\$	Good
--	--------	--------	------



Melon (Watermelon)

ALERT

Lower yields on new fields have kept pricing elevated out of Mexico. Colder temperatures nationwide have slightly reduced demand. Offshore watermelons are available from Florida. Weather permitting, Nogales is expected to have watermelons through April, after which we will transition to the domestic season. Personal and mini seedless varieties have better supplies.

Commodity/Region	Supply	Price	Quality
------------------	--------	-------	---------

Arizona (June-July) (October-November)	Steady	\$\$\$	Good
--	--------	--------	------



Mushroom

Strong supply and easy access

Commodity/Region	Supply	Price	Quality
------------------	--------	-------	---------

Nationwide	High	\$\$\$	Excellent
------------	------	--------	-----------



Onions

Onions are currently available from Washington, Idaho, and Utah. Demand remains strong across the U.S. Yellow and red onion pricing is steady, while white onion pricing is increasing. Transportation costs continue to drive the market. Mexican onions out of Texas have started, and U.S. Texas onions are expected to begin in March.

Commodity/Region	Supply	Price	Quality
------------------	--------	-------	---------

Eastern Oregon/Parma, ID (August - April)	High	\$\$\$	Excellent
San Joaquin Valley (May - August)	Light	\$\$\$	Good
Tri-Cities, Washington (July - April)	High	\$\$\$	Good



Pears

The pear market remains well supplied, with prices gradually increasing. Bartletts are winding down for some shippers, while others continue packing from controlled atmosphere storage.

Commodity/Region	Supply	Price	Quality
------------------	--------	-------	---------

	Steady	\$\$\$	Good
--	--------	--------	------

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

Supply Partners



Commodity Updates



Pineapples

ALERT

The pineapple market is stable week over week but remains tight due to earlier rain and planting gaps. Contracts maintain priority. Larger sizes should slowly increase toward late February. Six- and seven-count crowned fruit is up, eight-count crowned is steady, while crownless eight- and ten-count and organic pineapples remain tight. No port delays this week, though some are expected around Valentine's Day.

Commodity/Region Supply Price Quality

Costa Rica (Year round)	Light	\$\$\$	Good
----------------------------	-------	--------	------



Potatoes

Supply and demand are balanced, and sheds are looking to make deals. Smaller counts are becoming harder to find. Burbanks are now available, with Norkotahs as the main variety. Washington potatoes are producing excellent quality, peaking on mid sizes, while large and smaller counts remain snug. Florida colored potatoes are available, and trucking continues to drive the market.

Commodity/Region Supply Price Quality

Idaho Falls, Idaho (August-July)	Steady	\$\$\$	Good
Pasco, Washington (August-July)	Steady	\$\$\$	Excellent



Squash

ALERT

Florida squash production is severely reduced due to recent freezes, with recovery expected in February/March. Demand is shifting to Mexico, which has lighter volumes until mid-March. Prices are rising quickly and will remain above seasonal norms.

Commodity/Region Supply Price Quality

Mexico (June - September)	Light	\$\$\$	Good
Florida (November - May)	Light	\$\$\$	Fair



Stone Fruit

Domestic kiwi are nearly finished, while imported kiwi are arriving on both coasts with a steady market. Imported peaches, plums, and nectarines are available at reasonable prices, though volumes are light. Domestic Asian pears remain available.

Commodity/Region Supply Price Quality

San Joaquin Valley	Steady	\$\$\$	Good
--------------------	--------	--------	------



Tomatoes

ALERT

Tomato prices are climbing and expected to remain higher over the next two weeks due to freeze-related supply shortages. Florida crops were heavily impacted by freezing temperatures following 3 days straight of freezing temperatures. Expect very tight supplies come March and early April. Out west, Mexican volumes are improving, helping offset limited Florida supplies in the short term.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Light	\$\$\$	Good
Florida (November - May)	Light	\$\$\$	Good

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

Supply Partners





Weather Updates



CALIFORNIA

An offshore flow will bring above-average temperatures through Thursday. Morning lows will range from the low-mid 30s south of King City to the upper 30s–low 50s elsewhere, with daytime highs in the low 70s to low 80s.

As high pressure weakens Thursday, winds will turn lightly onshore, warming morning lows to the mid 30s–low 50s across the region, while daytime highs drop to the mid 60s–mid 70s.



MEXICO

Cool mornings and warm days are expected through the weekend with mostly dry conditions and only a few light sprinkles. Morning lows will range from the mid 30s to mid 40s Wednesday, upper 30s to upper 40s Thursday, mid 30s to mid 40s Friday, and upper 30s to upper 40s over the weekend. Daytime highs will be in the mid 60s to mid 70s through Friday, rising to the upper 60s to upper 70s across most of Central Mexico over the weekend.



FLORIDA

There is a slight chance of patchy frost Wednesday morning across parts of Northern and Central Florida. Thursday will be milder, briefly reducing the frost risk. A few isolated showers are possible Wednesday into Thursday. Friday will be much cooler and drier, with frost risk increasing over interior Northern and Central Florida. Milder temperatures over the weekend should end the frost threat, with warmer daytime highs. Winds will range from around 15 mph Wednesday to 15–25 mph Thursday into Friday across Southeast Florida and the Tampa Bay area.



ARIZONA

Warmer-than-normal conditions will continue through the period. Highs will peak in the low-mid 80s in most valleys Wednesday, with Thermal reaching 90 °F Tuesday and around 93 °F Wednesday. Slight cooling is expected into the weekend as an upper-level low moves in from the southwest. Morning lows are 10–12 degrees above normal, rising from the mid 40s–low 50s Wednesday to the low–upper 50s Thursday, then dropping back to the low-mid 40s by the weekend. Northerly winds gusting near 20 mph Wednesday will subside by Thursday afternoon, turning light and southerly by Friday.

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

Freight Updates



Freight this week sees some fresh items from Yuma in short supply creating shipper delays thus holding trucks. As mentioned in the past, advanced bookings and calculated loading dates are important for ensuring truck loading times and shipper availability is intersected.



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

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

	01/19/26	01/26/26	02/02/26	Change from	
				week ago	year ago
U.S.	3.530	3.624	3.681	↑ 0.057	↑ 0.021
East Coast (PADD1)	3.653	3.694	3.763	↑ 0.069	↓ -0.015
New England (PADD1A)	4.007	4.019	4.235	↑ 0.216	↑ 0.267
Central Atlantic (PADD1B)	3.843	3.876	3.988	↑ 0.112	↑ 0.002
Lower Atlantic (PADD1C)	3.548	3.591	3.628	↑ 0.037	↓ -0.054
Midwest (PADD2)	3.445	3.579	3.625	↑ 0.046	↑ 0.057
Gulf Coast (PADD3)	3.248	3.325	3.379	↑ 0.054	↓ -0.016
Rocky Mountain (PADD4)	3.246	3.367	3.419	↑ 0.052	↓ -0.052
West Coast (PADD5)	4.189	4.301	4.377	↑ 0.076	↑ 0.088
West Coast less California	3.782	3.944	3.982	↑ 0.038	↑ 0.125
California	4.658	4.712	4.830	↑ 0.118	↑ 0.043

*prices include all taxes

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

Crop Updates



Six More Weeks of Winter, but Transition Is Starting

Cold weather remains the dominant theme across most growing regions as we move deeper into February. Florida and parts of Mexico continue to experience below-normal temperatures, while California's coastal regions have stayed relatively dry. Driving through the Salinas Valley this week, you can start to see the next season taking shape. Fields are being prepped, beds are going in, and early signs of the spring transition are beginning to show, even as winter conditions linger elsewhere. With Valentines Day around the corner, strawberries are feeling the impact first.

Florida production remains limited after several nights of near-freezing temperatures, with growers protecting fields through irrigation. Yields are thin, and coverage will remain tight over the next 7 to 10 days. That pressure has shifted demand west and south. In California, Oxnard and Santa Maria are moving from fall plantings into spring fruit. Supplies are still light, but quality has been strong and yields are improving gradually. Baja continues to ramp on both conventional and organic fruit, while Central Mexico is moving past peak production and beginning its seasonal decline.

Tender leaf items out of the desert remain a challenge. Arugula, spinach, and spring mix supplies are limited following earlier moisture and recent heat swings that reduced yields. Quality is generally good, but volume remains constrained and most growers are holding close to averages. Arugula continues to be the tightest item, while spinach and spring mix are showing improved structure with little excess available.

Desert row crops are improving but still snug. Lettuce quality has strengthened overall, though fields are running ahead of schedule and availability remains limited. Broccoli supplies out West remain tight due to earlier weather disruptions, with ongoing trimming for pin rot and yellowing at harvest. Mexico continues to help supplement supply where possible, but markets remain elevated.

If the groundhog is right, we still have a few weeks of winter ahead. Supply conditions reflect that reality, with tight spots lingering and demand staying elevated around Valentine's Day.



JOEY PIEDIMONTE
SOURCING MANAGER