

# The Source

## Commodity of the Month - Citrus

### MARKET ALERTS

**Bell Peppers:** High prices and strong demand continue; green peppers very tight, red improving. Relief expected early April from FL and CA production.

**Carrots:** Bakersfield harvest done; Imperial Valley starting light. Warm weather should improve carrot size and availability in 3–4 weeks.

**Citrus (Limes):** Supplies extremely tight; Mexican prices mid-\$60s+, offshore volumes light; market volatile through early April.

**Citrus (Oranges):** California Navels peak on 56/72 count; small sizes tight through season. Flexibility needed; larger counts or Cara Caras may be substituted.

**Cucumbers:** Supplies tight; Mexico low yields, Honduras limited, Florida starts late March–April. Prices high next 2 weeks.

**Melon (watermelon):** Watermelon prices remain high; Mexican melons lead supply as offshore finishes and demand rises.

**Pineapple:** Pineapple market stable but tight; larger sizes rising late Feb. 6/7 crowned up, 8 crowned steady, 8/10 crownless tight; organics limited.

**Raspberries:** CEMEX supplies light, cartel unrest causing delays and quality issues; markets stay elevated.

**Squash:** Florida squash minimal through mid-March; early Sonora starting. Yellow tight, prices elevated.

**Tomatoes:** Rounds limited, prices high; Sonora Romas rising, volatile through April. Grapes affordable but may tighten.

### MARCH 11, 2026

### CROP UPDATES

Onion markets are transitioning from Northwest storage to fresh-run onions from Mexico and South Texas. Yellow and red onions are soft, while whites are tighter. Jumbo and medium sizes are available; late-storage lots may show translucency. Fresh-run onions are higher moisture, brighter, and more delicate. Proper airflow is key. New Texas onions are starting, with Imperial Valley and San Joaquin Valley crops coming later this spring. [Read more](#)

### WEATHER

**California:** High pressure brings warmer weather Wednesday; a minor heat wave Thursday–weekend will see highs 70s–90s and lows 40s–50s.

**Mexico:** Warm with minor changes; mostly dry. Highs 60s–80s, lows 40s–50s.

**Florida:** Warm and dry through Wednesday; cooler with rain Thu–Fri (0.1–0.5”), isolated showers Sat; winds 15–20 mph.

**Arizona:** Southwest high pressure brings a heat wave; highs mid 90s–low 100s, lows 50s–60s through the weekend.

### FREIGHT

Freight this week sees significant activity with rising fuel prices, shipper delays and seasonal transition between growing regions. We expect this pattern to remain in place for the foreseeable 8-10 weeks. Stay tuned for more info.



### IN PEAK SEASON

- Avocados
- Oranges
- Potatoes
- Grapes
- Pears
- Strawberries

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# Commodity Updates



## Apples

The apple market remains steady to slightly higher as supplies continue to gradually decline. Retail bag programs are absorbing a significant share of the smaller fruit, requiring foodservice customers to be more flexible with the sizes they use to meet demand. Sizes 100 and smaller are particularly difficult to source in Cosmic Crisp, Honeycrisp, Pink Lady, and Gala varieties. This supply dynamic is expected to persist until the new crop arrives.

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

Mexican asparagus production is at or just past its seasonal peak, with volumes expected to stay steady through March before declining in early April. Demand currently meets or exceeds supply as the industry prepares for Easter demand that could double. Weather issues in Peru are impacting quality, so some suppliers are delaying shipments until around Easter, keeping supply limited until domestic production in Washington, Idaho, and Michigan ramps up.

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

Markets remain steady at lower levels with ample fruit on the trees and consistent demand. Peak sizes are 48 and 60 count. Dry matter and oil content are in the low 30s, and fruit quality is excellent. Updates will be provided if conditions change.

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



High prices and strong demand continue through March. Green peppers remain very tight due to low volumes in Florida and a heavy supply of small and choice grade fruit from Mexico. Red pepper availability is improving but supplies are often diverted to higher paying markets. Some relief is expected in early April as production rebounds in Florida and the California desert.

Commodity/Region	Supply	Price	Quality
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Florida (November - May)	Light	\$\$\$	Poor
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Mexico (November - May)	Light	\$\$\$	Fair
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Berries (Blackberries)

CEMEX production has moved past peak volume, resulting in reduced availability. California production is expected to begin in April.

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



## Berries (Blueberries)

CEMEX and South American production are in seasonal decline, keeping volumes limited. California production is expected to begin ramping up over the next few weeks. Florida experienced severe cold weather three weeks ago, resulting in significant crop losses for many growers, and supplies are expected to remain limited in the near term.

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



## Berries (Raspberries)



Supplies remain light out of CEMEX, keeping markets elevated. Civil unrest driven by cartel activity has further compounded the shortage, leading to quality issues and transfer delays. Markets are expected to remain elevated over the next few weeks.

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



## Berries (Strawberries)

Production is increasing across all growing regions as CEMEX winds down. In California and Baja, favorable weather is driving higher volumes, and Salinas and Watsonville have started harvesting several weeks ahead of schedule, putting downward pressure on market prices.

Commodity/Region	Supply	Price	Quality
California (Year Round)	High	\$\$\$	Excellent
McAllen (November - May)	Light	\$\$\$	Poor
Dover, Florida (Year Round)	Light	\$\$\$	Fair

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

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**Driscoll's**  
Only the Finest Berries™



# Commodity Updates



## Broccoli

Broccoli supplies have improved across all growing areas, and the market is expected to remain steady into next week.

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



## Brussel Sprouts

Brussels sprout quality and supplies continue to improve, and the market is expected to remain steady with ample availability into next week.

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



## Carrots

**ALERT**

Bakersfield harvest is finished, with growers starting light volumes in the Imperial Valley. Warm, dry weather should improve carrot sizing over the next 3-4 weeks. Early harvesting in Bakersfield produced small carrots, so growers paused to allow sizing. In a few weeks, sizing and availability should be strong.

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 but are gradually improving this week. The market is expected to ease slightly heading into the weekend.

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



## Celery

Overall, the market is softer, with the best deals coming from Santa Maria and Oxnard. Shippers are flexible on all sizes. While value-added items remain higher, pricing is expected to decline throughout the week. Quality reports from the growing regions continue to be good.

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

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

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# Commodity Updates



## Citrus (Grapefruit)

Star Ruby grapefruit are available, peaking at 48 count, 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)

District 3 (CA Desert/AZ) is finished. District 1 (San Joaquin Valley) will serve as the main growing region until District 2 (Oxnard/Ventura County) ramps up in late March to early April. District 1 is currently peaking in 140, 165, and 115 sizes.

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



## Citrus (Limes)



District 3 (CA Desert/AZ) is finished. District 1 (San Joaquin Valley) remains the main growing region until District 2 (Oxnard/Ventura) ramps up in late March to early April. District 1 is peaking on 115, 95, and 140 count, with markets rising on 165 and 200 count as product sizes increase.

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



## Citrus (Oranges)



The California Navel crop is heavily weighted toward larger sizes, peaking on 56 and 72 count. Small sizes (113 and 138 count) are very limited and expected to remain tight through the season and into the Valencia transition, possibly starting in early April. Flexibility with size and grade will be necessary, with substitutions to larger Navels likely. Suppliers are managing to contract size averages. Schools and DOD programs should be encouraged to accept 88 or 72 count fruit.

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



## Cucumber



Supplies are extremely limited due to low Mexican yields and a slow spring start. Honduran imports are tight, and Florida harvest won't begin until late March or early April. Expect elevated prices over the next two weeks.

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

Florida supplies are negligible, with only minor small or off-grade fruit available; the spring crop remains very limited after the freeze. Mexico is shipping steady volumes into Nogales and McAllen, with mild market fluctuations but overall adequate supply.

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



## Garlic

California garlic is progressing with good quality, supplemented by ongoing Mexican supplies.

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Steady	\$\$\$	Good
Bakersfield, California (Year Round)	Steady	\$\$\$	Good
Gilroy, California (Year Round)	Steady	\$\$\$	Good



## Grapes

Green grapes are tighter on both coasts as Peru nears the end of its season and Chile has lighter volumes. Supply has met current needs but is expected to tighten later this month. Red grapes remain in good supply, with a steady market on both coasts.

### Grapes (Green)

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

### Grapes (Red)

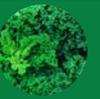
Commodity/Region	Supply	Price	Quality
	Steady	\$\$\$	Good



## Green Onions

Green onion supplies remain very tight but are starting to ease slightly. Recent rains and cooler weather have lowered yields, and limited availability is expected to continue into next week.

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



## Kale

Kale supplies and quality remain strong, 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

Very warm temperatures in the Yuma region this weekend and next week are causing internal burn, puffiness, and leaf discoloration. Early-week promotions may offer good deals to keep product fresh. Yuma production will continue for 2-4 more weeks, with Huron starting in the next week or two.

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



## Lettuce Leaf

Romaine, green leaf, and red leaf supplies are good this week, though romaine pricing remains elevated. Warm temperatures may cause tip and fringe burn on all leaf items by next week. Weights and sizing are currently above average, and pricing is expected to stay competitive. Huron production should begin within one to two weeks.

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



## Lettuce Tender Leaf

Tender leaf items like spinach, cilantro, and arugula remain in good supply. Minor insect damage and discoloration are reported, but availability is expected to stay strong into next week.

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



## Melon (Cantaloupe)

Westside and Nogales deals are complete. Offshore cantaloupes are available in California, Texas, Florida, and the Northeast, with pricing up due to strong demand. Retailers are leveraging warmer temperatures and scheduled prebooks to meet customer needs.

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 but are expected to face challenges throughout March. Fields in Guatemala and Honduras have been impacted by plant viruses, leaving Mexican honeydews to help supplement the market.

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



Lower yields and Mexican border issues have kept watermelon prices elevated. Warmer national temperatures are boosting demand. Offshore melons are nearly finished, leaving Mexican melons as the primary supply until domestic production begins.

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

Availability is strong, with ample supplies on hand.

Commodity/Region	Supply	Price	Quality
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Nationwide	High	\$\$\$	Excellent
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## Onions

Onions are available from Washington, Idaho, and Utah, with additional supplies from Texas and Mexico. Demand has increased, and quality is being monitored as the season winds down. Rising fuel costs—up about \$1 week over week in many areas—are impacting transportation and driving the market.

Commodity/Region	Supply	Price	Quality
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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 gradually firming. Bartlett shipments are mostly finished, easing pressure on Anjou pears. Red pears are adequately supplied, and Bosc pears remain plentiful.

Commodity/Region	Supply	Price	Quality
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	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Pineapples

**ALERT**

The pineapple market is stable but remains tight due to earlier rain and planting gaps, with contracts maintaining priority. Larger sizes are expected to gradually increase by the end of February. Currently, 6- and 7-crown counts are up, 8-crown counts are steady, and 8- and 10-crownless remain tight. Organic pineapples are also limited.

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



## Potatoes

Supply and demand are balanced, with sheds actively making deals. Smaller counts are becoming harder to find. Burbank potatoes are now available, with Norkoth as the main variety. Washington potatoes are peaking on mid sizes with excellent quality, while large and small counts remain tight. Florida color potatoes are available. Transportation costs are impacting the market, with fuel up \$1 in some regions.

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



## Squash

**ALERT**

Florida supplies will be minimal through mid-March, with early Sonora production just starting. Expect short-term elevated prices for yellow and zucchini squash, with yellow squash especially tight due to the Florida freeze and the Sinaloa-to-Sonora transition in Mexico.

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



## Stone Fruit

Imported peaches, plums, and nectarines are winding down, with nectarines finishing first, peaches by month's end, and plums continuing into April. Imported kiwi from Greece and Italy remain steady, with Chilean kiwi starting in April.

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



## Tomatoes

**ALERT**

Rounds are very limited due to the Florida freeze and Mexico, keeping prices elevated at lower levels. Roma production in Sonora is increasing, causing prices to ease, but markets are expected to remain volatile through April as Florida salvage crops, Mexican disease issues, and a 17% duty continue to pressure supply. Grapes are currently affordable with low demand, though partial Florida damage and split Mexican pricing could push prices higher if supplies tighten this week.

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

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

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# Weather Updates



## CALIFORNIA

High pressure will build Wednesday, bringing warmer conditions ahead of a minor heat wave starting Thursday. Morning lows will range from the upper 30s to low 50s, with daytime highs in the upper 60s to low 80s. The heat wave Thursday through the weekend will push highs to the low 70s to low 90s and lows to the low 40s to mid 50s.



## MEXICO

Warm temperatures will continue with only minor daily changes. A few light, isolated showers are possible through the weekend, but most areas should remain dry. Highs will range from the mid 70s to mid 80s through Wednesday, drop to the upper 60s to upper 70s on Thursday, and rise to the low 70s to low 80s Friday through Sunday. Lows will stay in the mid 40s to mid 50s through the weekend.



## FLORIDA

Warm and dry conditions are expected through Wednesday, turning cooler and potentially wetter Thursday into Friday. Saturday will be warmer with only a few isolated showers. Rainfall totals Thursday and Friday are forecasted at 0.20–0.50 inches in northern Florida and 0.10–0.30 inches across southern and most of central Florida. Winds will gust 15–20 mph through Thursday.



## ARIZONA

A strong high-pressure ridge over the Southwest will bring a significant heat wave to the low deserts. Highs will reach the mid 90s to low 100s by Thursday, about 15–20 degrees above normal, and remain elevated through the weekend. Morning lows will rise from the low to mid 50s Wednesday to the upper 50s to mid 60s across most fields by Saturday.

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

# Freight Updates



Freight this week sees significant activity with rising fuel prices, shipper delays and seasonal transition between growing regions. We expect this pattern to remain in place for the foreseeable 8-10 weeks. Stay tuned for more info.



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

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

	02/23/26	03/02/26	03/09/26	Change from		
				2 year ago	year ago	week ago
U.S.	3.809	3.897	4.859	↑ 0.855	↑ 1.277	↑ 0.962
East Coast (PADD1)	3.843	3.924	4.901	↑ 0.781	↑ 1.202	↑ 0.977
New England (PADD1A)	4.201	4.314	4.970	↑ 0.683	↑ 0.939	↑ 0.656
Central Atlantic (PADD1B)	4.104	4.122	4.940	↑ 0.631	↑ 1.033	↑ 0.818
Lower Atlantic (PADD1C)	3.708	3.808	4.880	↑ 0.847	↑ 1.293	↑ 1.072
Midwest (PADD2)	3.798	3.888	4.801	↑ 0.888	↑ 1.304	↑ 0.913
Gulf Coast (PADD3)	3.489	3.598	4.627	↑ 0.925	↑ 1.343	↑ 1.029
Rocky Mountain (PADD4)	3.683	3.737	4.397	↑ 0.405	↑ 0.983	↑ 0.660
West Coast (PADD5)	4.465	4.534	5.556	↑ 0.905	↑ 1.306	↑ 1.022
West Coast less California	4.050	4.138	5.088	↑ 0.922	↑ 1.320	↑ 0.950
California	4.944	4.990	6.096	↑ 0.889	↑ 1.289	↑ 1.106

\*prices include all taxes

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

# Crop Updates



## The Onion Deal Rolls On

The onion market is now entering its seasonal transition as Northwest storage supplies begin winding down and fresh-run onions start moving out of Mexico and South Texas.

Markets are currently soft on yellow and red onions as new crop volume competes with remaining Northwest inventories. White onions remain the exception, where supplies are tighter and pricing is beginning to firm.

In the Pacific Northwest, Washington, Idaho, and Eastern Oregon continue shipping storage onions, though the season is clearly entering its later stages. Jumbo and medium sizes remain available while super colossal sizes are more limited. As we move deeper into the storage window, buyers may begin to see more translucency or watery scales in some lots. This is a normal late-season condition and often improves with proper airflow as the outer rings dry.

One of the biggest shifts this time of year is the transition from cured storage onions to fresh-run onions.

Northwest storage onions have been cured for months, developing the familiar golden, papery husk and lower pulp temperatures that allow them to store and ship exceptionally well.



# Crop Updates



Fresh crop onions from Mexico and South Texas are very different. They are harvested and packed quickly, often showing flakier skins that have not fully cured. Because they are grown in warmer conditions, they also carry higher pulp temperatures than storage onions when loaded. These onions tend to have more moisture, brighter color, and a stronger flavor profile, but they are also more sensitive to handling and have a shorter shelf life.

Airflow becomes especially important during this transition period. Proper ventilation helps reduce the effects of translucency in late storage onions and assists in pulling heat and moisture out of fresh-run onions, extending their usability.

New crop Mexican onions are currently crossing into South Texas with all colors available, with jumbo yellows the most plentiful size. Domestic Texas onions have also begun shipping in a limited manner and will ramp up over the coming weeks, with the Texas deal expected to run through May.

Looking ahead, California's Imperial Valley onion season is expected to begin in late April, before transitioning north into the San Joaquin Valley in early June. New Mexican-grown onions are also expected to enter the market in early June, adding additional domestic supply as the summer deal gets underway.

While the current focus is on finishing the storage season, growers across the Northwest are already preparing beds for the next crop. Fields are being worked and planted for what will become the fall harvest later this year.



**JOEY PIEDIMONTE**  
**SOURCING MANAGER**