

# The Source

Commodity of the Month - Citrus

## MARKET ALERTS

**Asparagus:** Peruvian asparagus arrives March 27; supply steady by mid-April. Mexico yields down 15–30%, northern fields ending post-Easter; southern regions ramp up mid-April.

**Bell Peppers:** Florida supply is very limited, Mexico crossings light, and red peppers tight. Markets stay high until mid-April.

**Carrots:** Bakersfield harvest is done; Imperial Valley is light. California carrot supplies and sizing should improve in 3–4 weeks.

**Citrus (Limes):** Market elevated; small new crop fruit dominates, larger sizes scarce. Veracruz rain may tighten supply.

**Citrus (Oranges):** California Navels favor large sizes; small fruit is limited. Flexibility needed; promote 88 or 72 count.

**Cucumbers:** Supply very short, demand high, Mexico/Honduras light. Florida spring crop in mid-April may ease pressure.

**Eggplant:** Florida winter crop nearly done, Mexico light; markets stay high until early April.

**Melon (watermelon):** Watermelon prices high; Mexican melons main supply until domestic crop starts.

**Pineapple:** Supply tight ahead of Easter; 6/7, 8/10 count and organic limited. Prices pressured; contracts prioritized.

**Tomatoes:** Rounds limited, prices high; Roma easing but volatile; grapes affordable, may rise if supply tightens.

## MARCH 25, 2026

## CROP UPDATES

Florida and Mexico are limiting pepper and tomato supplies. Freeze damage in Florida and extreme heat in Mexico are reducing yields and quality, keeping markets elevated. Bell peppers, especially reds, are tight, with mixed quality and limited premium packs. Tomatoes face similar pressure, with rounds, romas, and grape/cherry tight. Relief is gradual — Sonora, California, and Georgia will ramp later, but tight supply and high prices continue through mid- to late April.

[Read more](#)

## WEATHER

**California:** A northern low will deepen the marine layer, boost onshore winds, and slightly cool temps through Thursday, then warm into the weekend.

**Mexico:** Mostly dry through March 29 with few sprinkles; warm Friday, cooling over the weekend. Highs low 70s–low 80s, dropping to mid 60s–mid 70s; mornings mid 40s–mid 50s.

**Florida:** Isolated showers Wednesday, drier later, with possible weekend showers. Winds 20–25 mph easing Friday. Temps warm through Friday, mild Saturday, cooler Sunday.

**Arizona:** Record heat continues through the weekend, highs mid-90s–low 100s, lows warming mid-50s–low 70s; light winds. Tropical moisture may bring eastern AZ showers Sunday.

## FREIGHT

We are preparing for Spring transition back to Salinas from Yuma. As suppliers start to produce product in both regions, Salinas and Yuma, PFL is utilizing cross docking and intrastate carrier partners to seam growing regions together. Reach out to your PFL rep for more info.

PRO\*FRESH  
LOGISTICS

## IN PEAK SEASON

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

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# Commodity Updates



## Apples

The apple market is holding steady to slightly higher as supplies continue to tighten. Retail bag programs are absorbing a significant share of smaller fruit, pushing foodservice buyers to get creative with sizing to meet their needs. Smaller sizes, 100 count and below, are especially limited in Cosmic Crisp, Honeycrisp, Pink Lady, and Gala varieties. This trend is expected to persist until the new crop becomes available.

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



## Asparagus



Minimal Peruvian asparagus shipments arrive in Miami March 27, with added air freight for Easter demand, though ocean freight quality remains a concern. Milder El Niño weather is improving outlooks, with steady supply expected by mid-to-late April. Extreme heat in Sonora and Baja cut yields 15-30%, tightening supply and impacting quality. Northern Mexico production will wind down after Easter, shifting to San Luis Rio Colorado, while Southern Baja and Central Mexico ramp up from mid-April into May.

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



## Avocados

Markets remain steady at lower levels, supported by ample on-tree supply and consistent demand. Peak sizing is 48 count, with dry matter and oil content in the low 30s, resulting in excellent eating quality. We'll provide updates if anything changes on the avocado front.

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



## Bell Peppers



Florida supply is extremely limited, with mostly lower-grade product and declining volume as the season winds down. Mexico crossings are very light, with sizing challenges and growers diverting red peppers to green, tightening future red supply. Markets are expected to remain high and tight for the next 3-5 weeks, with meaningful relief unlikely until mid-April as Coachella production begins.

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

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

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# Commodity Updates



## Berries (Blackberries)

Supplies remain tight, with most volume currently coming out of Mexico. California production is expected to begin adding limited support by mid to late April.

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



## Berries (Blueberries)

The industry continues to face shortages of this item from Mexico, Peru, and California. California production is expected to grow week over week heading into late April, while the PNW crop should begin in 4-6 weeks, weather permitting.

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 from CEMEX and Baja, keeping markets elevated as demand outpaces supply. Some quality issues are still being reported.

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



## Berries (Strawberries)

Above-normal temperatures are causing heat-related issues in the fields, impacting yields in Salinas, Watsonville, Santa Maria, and Oxnard. Markets are firming, while Florida is essentially finished for the season due to late planting and quality concerns. This shifting demand is putting additional pressure on California supplies.

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

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

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# Commodity Updates



## Broccoli

Broccoli supplies remain strong across all regions, and the market is expected to stay 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 supplies remain very strong, with the market expected to stay steady and well supplied into next week.

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



## Carrots

**ALERT**

Harvest in the Bakersfield region has finished, with only light activity starting in the Imperial Valley. We expect overall California carrot supplies to improve in 3-4 weeks as warm, dry weather allows the crop to size up. Early harvesting from new fields, driven by the shortage in Bakersfield, resulted in smaller-than-ideal carrots. Growers had to slow harvesting to let the crop reach proper size, protecting the industry from further stress. In a few weeks, sizing should be stronger and availability much better.

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 solid across all regions, with the market expected to ease slightly heading into the weekend.

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



## Celery

This market is soft for this commodity. Production in Yuma is light but available, while Oxnard and Santa Maria remain the primary growing regions offering the best deals. Value-added items show no price increases, and quality and texture remain above average across most suppliers.

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
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California (Year Round)	Steady	\$\$\$	Good
Texas (October - April)	Light	\$\$\$	Good



## Citrus (Lemons)

District 3 (CA Desert/AZ) is finished. District 1 (San Joaquin Valley) is now the main growing region, peaking on 115/95/140 count, until District 2 (Oxnard/Ventura) ramps up toward late March/early April. Markets are starting to rise on 165 and 200 count as the product continues to size up.

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



## Citrus (Limes)

**ALERT**

The market remains elevated as supplies are very limited. New crop fruit is mostly small (230–250 count), with larger sizes scarce and commanding higher prices. Offshore supplies are adequate, but rain forecast in Veracruz later this week could further tighten the market.

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

**ALERT**

The California Navel crop is skewed toward larger sizes, peaking on 56 and 72 count. Smaller sizes 113 and 138 count are very limited and expected to stay tight through the season and into early April Valencias. Flexibility on size and grade will be needed, with larger Navels used to fill orders. Suppliers will stick to contract size averages. Please inform schools and DOD programs and encourage 88 or 72 count acceptance.

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

**ALERT**

Overall supply is extremely short, with demand far exceeding availability and prices at historic highs. Volumes from Mexico and Honduras are light, with only limited near-term relief from Sonora. Florida's spring crop, expected in mid-April, should provide the first meaningful improvement.

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

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

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# Commodity Updates



## Eggplant

**ALERT**

Florida's winter crop is nearly finished, with minimal production remaining. Mexico crossings are very light, keeping supply tight. Markets are expected to remain elevated until the Florida spring crop begins in early April.

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



## Garlic

The California garlic crop is progressing well with strong quality, while Mexican supplies continue to complement 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

Green grape supplies are tighter on both coasts, with prices up slightly. Peru is nearly finished, and Chile is offering lighter volume. Current green grape availability meets demand, but supplies are expected to tighten later this month. Red grapes are in good supply on both coasts, with the market slightly higher.

### Grapes (Green)

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

### Grapes (Red)

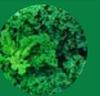
Commodity/Region	Supply	Price	Quality
	Steady	\$\$\$	Good



## Green Onions

Green onion supplies continue to improve, easing the overall market. Supplies are expected to remain steady into next week, depending on heat conditions.

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



## Kale

Kale supplies and quality remain strong, with similar conditions expected to continue 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

Strong production is expected this week, with harvesting in Yuma, Santa Maria, and Huron. Despite warm temperatures, quality remains good, with weights averaging 39–44 pounds and very clean. Minimal discoloration and no internal burn have been reported. Suppliers are flexible on volume orders, so promote as much as possible this week.

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

Romaine, green leaf, and red leaf are all in good supply, with strong availability expected throughout the week. Production is active in Yuma, Santa Maria, and Huron, with Salinas starting next week. Romaine hearts remain plentiful, and shippers are flexible, so promote as much as possible. Quality across all leaf items is above average for weight, texture, and overall condition, and all value-added leaf items are off escalation.

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

Tender leaf items like spinach, cilantro, and arugula are in good supply, with only minor insect damage and discoloration reported. Expect availability to tighten next week as the heat wave impacts Yuma.

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

Offshore cantaloupes are available in California, Texas, Florida, and the Northeast. Pricing has increased due to strong demand, with retailers taking advantage of warmer temperatures and scheduled prebooks.

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



## Melon (Watermelon)



Watermelon prices remain elevated due to lower yields and border challenges, while warmer national temperatures are driving higher demand. Offshore melons are nearly finished, leaving Mexican melons as the main supplier until domestic production begins.

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



## Mushroom

Supplies and availability are excellent.

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



## Onions

Onions are available in Washington, Idaho, and Utah, with demand increasing as we monitor quality late in the storage season. Onions from Mexico and Texas are also available. Transportation costs are impacting the market, with fuel prices up about \$1 week over week in many areas.

Commodity/Region	Supply	Price	Quality
Eastern Orgeon/Parma, ID (August - April)	High	\$\$\$	Excellent
San Joaquin Valley (May - August)	Light	\$\$\$	Good
Tri-Cities, Washington (July - April)	High	\$\$\$	Good



## Pears

The pear market is gradually firming. Bartletts are mostly finished, easing pressure on Anjou. Red pears remain in adequate supply, and Bosc pears are plentiful.

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

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

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# Commodity Updates



## Pineapples

**ALERT**

Pineapple supplies are tightening as demand rises ahead of Easter, putting pressure on the market. Availability of 6/7 count crowned fruit is very limited, with improvement expected in 2-4 weeks. Overall supply is slightly lower than previous weeks, making it challenging to meet Easter volumes. Contracts remain the priority. Crownless 8 and 10 count fruit are tight, and organic pineapples continue to be limited. Bunker fuel costs will be a key factor for Q2 pricing.

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



## Potatoes

Supply and demand are strong, with sheds offering deals on 40 and 50 count and #2s. 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 smaller counts remain tight. Florida color potatoes are limited due to the freeze. Transportation costs are impacting the market, with fuel up about \$1 in some areas. in some regions.

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



## Squash

Mexico is transitioning from Sinaloa to Sonora, with volumes expected to improve. Florida's spring crop is starting with strong fields and growing availability. Markets are expected to ease soon as supply increases.

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



## Stone Fruit

Imported peaches, plums, and nectarines are winding down. Nectarines are finished, and peaches are nearly done, with only small amounts expected late in the week. Imported plums will continue into April. Kiwi supplies from Greece and Italy are steady, while Chilean kiwi will begin in April. The last of the domestic kiwi has finished.

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



## Tomatoes

**ALERT**

Supplies of Roma, round, and grape tomatoes are tightening due to freeze damage, weather, and production issues in Florida and Mexico. Roma tomatoes are under the most pressure, with limited volume expected into early May. Round tomatoes remain short, and grape tomato supplies are gradually tightening. Overall quality is inconsistent, and supply is expected to stay constrained in the coming weeks.

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

A low passing to the north will deepen the marine layer, increase onshore winds, and cool temperatures slightly through Thursday. Morning lows will range from the upper 30s to low 50s, with highs in the mid 60s to mid 70s near the coast and low to mid 80s inland. As the system exits Friday, temperatures will warm again into the weekend.



## MEXICO

Expect mostly dry weather through March 29, with just a few sprinkles. Temperatures will stay warm and steady Friday, then cool over the weekend. Highs will range from the low 70s to low 80s through Friday, dropping to the mid 60s to mid 70s on the weekend. Morning lows will dip into the mid 40s to mid 50s through Sunday.



## FLORIDA

Isolated showers will persist across the state on Wednesday, followed by drier conditions later this week. A few isolated showers may return over the weekend. Winds will gust 20–25 mph through Thursday, easing to around 20 mph or less by Friday. Temperatures will warm through Friday, stay mild on Saturday, and cool on Sunday with the next frontal passage.



## ARIZONA

This record-breaking heat wave will continue through the weekend, with highs in the mid-90s to low 100s and overnight lows gradually warming from the mid-50s to low 60s Wednesday, up to the mid-60s to low 70s by Saturday. Winds will remain mostly light and variable. Latest models show tropical moisture reaching Arizona late Sunday, though showers are expected mainly in the eastern half of the state.

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

# Freight Updates



We are preparing for Spring transition back to Salinas from Yuma. As suppliers start to produce product in both regions, Salinas and Yuma, PFL is utilizing cross docking and intrastate carrier partners to seam growing regions together. Reach out to your PFL rep for more info.



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

	03/09/26	03/16/26	03/23/26	Change from		
				2 year ago	year ago	week ago
U.S.	4.859	5.071	5.375	↑ 1.341	↑ 1.808	↑ 0.304
East Coast (PADD1)	4.901	5.105	5.480	↑ 1.355	↑ 1.805	↑ 0.375
New England (PADD1A)	4.970	5.236	5.759	↑ 1.438	↑ 1.772	↑ 0.523
Central Atlantic (PADD1B)	4.940	5.196	5.629	↑ 1.335	↑ 1.757	↑ 0.433
Lower Atlantic (PADD1C)	4.880	5.057	5.395	↑ 1.353	↑ 1.826	↑ 0.338
Midwest (PADD2)	4.801	4.970	5.160	↑ 1.174	↑ 1.669	↑ 0.190
Gulf Coast (PADD3)	4.627	4.835	5.134	↑ 1.417	↑ 1.869	↑ 0.299
Rocky Mountain (PADD4)	4.397	4.796	5.174	↑ 1.188	↑ 1.759	↑ 0.378
West Coast (PADD5)	5.556	5.856	6.310	↑ 1.644	↑ 2.081	↑ 0.454
West Coast less California	5.088	5.360	5.826	↑ 1.653	↑ 2.072	↑ 0.466
California	6.096	6.428	6.870	↑ 1.646	↑ 2.094	↑ 0.442

\*prices include all taxes

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

# Crop Updates



## Florida Freeze Fallout Meets Mexican Heat

The market remains under pressure as Florida continues to recover from freeze damage and Mexico struggles with extreme heat. The combination is limiting supply, impacting quality, and keeping both pepper and tomato markets elevated as March winds down.

Bell peppers remain one of the most challenged categories.

Mexico, the primary supplier, is dealing with excessive heat that is slowing production and limiting harvestable yields. Shortened harvest windows are reducing overall output, while quality is mixed with increased insect pressure and fewer premium packs available. Larger sizes and No. 1 grade product are especially tight, pushing more volume into choice-grade supplies.

Florida is contributing very little volume following winter freeze damage. Many March fields were lost or set back, and what remains requires heavy grading. Supplies are inconsistent, with growers focused on managing through reduced yields until new fields begin in April.

Red bell peppers are even tighter, and recent harvesting decisions are compounding the issue. Over the past several weeks, growers have been pulling red fields early while fruit is still green to help cover green bell demand.

That shift is now catching up to the market. True red volume is limited, and quality is being impacted, with increased reports of “chocolating” and inconsistent color development. Florida offers little relief, with extremely light, day-to-day volume and variable quality.



# Crop Updates



Relief is coming, but slowly. Sonora is expected to start in late March with fewer acres planted, while the California desert may begin slightly earlier than normal due to warm weather. Georgia remains several weeks out, expected in late May. Until then, expect elevated pricing and continued tightness across the pepper category.

Tomatoes are following a similar pattern, with supply disruptions stacking across regions.

Mexican production slowed following the mid-March national holiday and is now further constrained by extreme heat in Sonora and Sinaloa. Harvest crews are starting earlier in the day, but shortened picking windows are limiting overall output. Quality remains mixed, with some growers pulling from older or previously abandoned fields.

Florida continues to feel the impact of recent freezes, winds, and frost damage. Volume is extremely limited across rounds, romas, and grape and cherry tomatoes, and additional grading is required to meet specifications.

Rounds are seeing the most pressure on larger sizes, particularly 4x4 and 4x5. Romas have slightly better availability on medium sizes but remain tight overall. Grape and cherry tomatoes are also tightening as both domestic and Mexican supplies are constrained at the same time.

Expect tomato markets to remain firm with upward pricing pressure and continued volatility through mid- to late April, as new regions gradually come online.

Overall, the market is working through a difficult transition window. Florida is slow to recover, Mexico is weather-constrained, and supply gaps are showing up across multiple commodities. We're expecting continued tight availability, elevated pricing, and variability in quality and packouts.



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