

The Source

Commodity of the Month - Carrots

MARKET ALERTS

Asparagus: Asparagus is very tight. Mexico supply declining with Baja just starting and Central Mexico not stable until mid June. Peru is steady but limited by demand and high air freight.

Broccoli: Broccoli is very tight with lower yields from heat and rain, pushing the market slightly higher next week.

Brussel Sprouts: Brussels sprouts are tightening, with prices edging higher into the weekend.

Carrots: Imperial Valley leads now, with Bakersfield expected in 3-4 weeks. Early harvest caused small sizing, but slowing harvest should improve size and supply.

Cauliflower: Cauliflower is very tight, with prices expected to rise slightly next week.

Celery: Strong market as demand exceeds supply; Yuma done and SoCal tight. Light supplies, good quality, larger sizes best, value-added stays escalated.

Citrus (Lemons): District 2 leads with District 1 support; crop 70/30 choice/fancy, sizes peak 115-140ct, with 165ct and smaller lemons very tight.

Citrus (Oranges): Navels skew large (56/72ct); small sizes tight through season. Expect substitutions and need flexibility (88/72ct).

Lettuce (iceberg): Demand exceeds supply through month; rain disrupts harvest. Quality issues persist, value-added escalated, and suppliers are tight on coverage.

Onions: PNW is finished, Texas is limited from rain, and California is now the main source focused on contracts while rebuilding supply.

Pineapple: Pineapple supplies are tight, especially 6/7ct and larger sizes, with contracts prioritized. Expect tight supply through April and higher Q2 costs.

Tomatoes: Supply very tight, especially romas and rounds; grapes steady. Gradual improvement expected later as Mexico/Baja ramps up, but near-term remains limited.

Strawberries: Rain across all regions has slowed harvest and will take days to recover, reducing fill rates and likely causing order cuts. Supplies remain light with expected water-related quality issues.

APRIL 22, 2026

CROP UPDATES

Rain disrupted Central Coast harvest, tightening row crops and causing quality issues with April expected to stay light. Iceberg is especially tight while romaine and leaf are steadier but firming. Strawberries remain short as regions transition keeping prices high. Raspberries are tight blueberries are slowly improving and blackberries are slightly easing. Tomatoes especially romas and rounds remain very tight with elevated pricing. [Read more](#)

WEATHER

California: Showers linger Wednesday morning, then clear with highs in the 60s-70s. A weak system Saturday brings cooler temps (60s) and spotty drizzle, followed by warming Sunday under high pressure.

Florida: Dry Wednesday, then warmer with increasing weekend showers. Florida highs trend from 80s into low 90s, lows 50s-60s. Winds light (<20 mph) through Friday.

Mexico: Temps warm into the weekend with isolated mountain showers (light rainfall, locally higher in storms). Highs rise from 70s-80s to 80s-90s, with lows in the mid-50s to low 60s.

Arizona: Winds ease midweek (15-25 mph), briefly increase Saturday (20-30 mph). Temps range from 80s midweek, peak in 80s-90s Friday, then cool back to 70s-80s by Sunday, with lows mainly in the 50s-60s.

FREIGHT

Yuma season is done and Salinas is full go. Freight this week sees increased shipper delays due to newer crops and quality issues at field level. Expect shipper delays to last for the remainder of April.



IN PEAK SEASON

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

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Commodity Updates



Apples

Little has changed in the market. Declining supplies and softer May demand should keep things balanced, with prices holding steady as schools break for summer. Retail bag programs continue to absorb smaller fruit, leaving 100-count and smaller sizes tight across Cosmic Crisp, Honeycrisp, Pink Lady, and Gala until the new crop arrives.

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



Asparagus



Mexico asparagus is extremely tight with declining San Luis supply and limited Baja ramp starting, improving early May. Central Mexico won't stabilize until mid June. Peru is steady but fair quality and limited by demand and high air freight, with tighter supply expected into summer.

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



Avocados

Markets are steady at lower levels, with ample fruit still on the trees and consistent demand. Peak sizing is currently 48 count. Dry matter and oil content are in the low 30s, and the fruit is eating very well. We'll keep you updated with any changes on the avocado front.

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



Bell Peppers



Florida volume is improving, though recent rains continue to create quality concerns, with #1 grade remaining tight and a higher share of off-grade fruit. Mexico crossings remain very limited, especially for colored peppers, keeping that segment short. Additional supply from both coasts, including Coachella, is expected to help ease pricing soon.

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

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

Supply Partners



Commodity Updates



Berries (Blackberries)

Supplies are improving, and we expect California to begin showing increased production in the final week of April.

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



Berries (Blueberries)

CMex production is tapering off, while California is beginning a gradual increase as we move into late April and early May. Georgia has started to come on lightly, and the PNW is expected to begin ramping up by mid-May. Markets are trending lower in response.

| 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 limited from CEMEX, while California hoop berry production is expected to begin in the next one to two weeks. Demand remains strong.

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



Berries (Strawberries)

ALERT

Rain has impacted all growing regions over the past two days, making it difficult for growers to access fields and harvest product. It will take several days for conditions to dry sufficiently for crews to begin stripping and cleanout. As a result, fill rates are expected to decline, with potential order cuts in the coming days. Offerings will remain light, and water-related quality issues are likely.

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

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

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Commodity Updates



Broccoli

ALERT

Broccoli supplies are extremely limited, with lower yields from recent heat and rain expected to push the market slightly higher into next week.

| Commodity/Region | Supply | Price | Quality |
|--------------------------------------|--------|--------|---------|
| Mexico (Year Round) | Steady | \$\$\$ | Good |
| Santa Maria, California (Year Round) | Steady | \$\$\$ | Good |
| Salinas, California (May- October) | Light | \$\$\$ | Good |



Brussel Sprouts

ALERT

Brussels sprout supplies are fair but trending tighter, with the market expected to edge higher into the weekend.

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



Carrots

ALERT

The Imperial Valley is currently the main growing region. Availability should improve in the next three to four weeks as Bakersfield comes back online, depending on weather. Early harvesting in Imperial led to smaller sizing, so growers have slowed production to allow crops to size up. As a result, both sizing and availability should improve in the coming weeks.

| 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

ALERT

Cauliflower supplies are extremely limited due to low yields, with the market expected to tick slightly higher into next week.

| Commodity/Region | Supply | Price | Quality |
|--------------------------------------|--------|--------|---------|
| Mexico (Year Round) | Steady | \$\$\$ | Fair |
| Santa Maria, California (Year Round) | Light | \$\$\$ | Good |
| Salinas, California (May - October) | Light | \$\$\$ | Good |



Celery

ALERT

Strong market conditions are expected to continue this week as demand exceeds supply. With Yuma finished and limited availability in Southern California, supplies will remain light. Quality is above average, with best sizing on larger packs. Value-added items will remain escalated through the month.

| 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 available, peaking on 48ct fruit, and are being shipped out of Riverside and the San Joaquin Valley.

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



Citrus (Lemons)



District 1 (San Joaquin Valley) is currently supporting District 2 (Oxnard/Ventura County), which is now the primary growing region. The crop is running approximately 70% choice and 30% fancy due to coastal growing conditions. Sizing is peaking in 115/95/140ct, while markets remain extremely tight on 165ct and smaller lemons.

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



Citrus (Limes)

The market is easing for the first time in months, with further stabilization and a larger drop expected after Cinco de Mayo. Quality and shelf life are strong as new crop production ramps up. Small sizes offer the best value, while larger sizes (110s/150s) remain tight through summer, with imports expected to finish in May.

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



Citrus (Oranges)



California Navel oranges are heavily skewed to larger sizes, peaking on 56ct and 72ct. Smaller sizes (113ct and 138ct) are very limited and expected to stay tight through the remainder of the season and into the Valencia transition. Flexibility will be needed, with substitutions into larger fruit likely. Suppliers will hold to contract averages, so programs should be encouraged to accept 88ct or 72ct fruit.

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



Cucumber

Mexico supply is stabilizing as demand softens, with markets trending lower. Florida production is ramping up quickly, adding further downward pressure on pricing. Overall supply is expected to remain adequate, with Georgia coming on in mid-May and creating opportunities for promotions.

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

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

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Commodity Updates



Eggplant

Florida spring production is ramping up, though the market remains active for now. Mexico has yet to see the typical post-holiday dip, but it is expected soon. As supply increases, pricing should ease, positioning eggplant as a strong promotional item in 2-3 weeks.

| 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 support and complement 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

Green grapes are tightening on both coasts as Peru nears completion and Chile volumes remain lighter. Supply has been sufficient so far, but is expected to tighten as the month progresses. Red grapes are also tighter than recent weeks, though still more available than greens. Mexico is expected to start before South American supplies finish, but a significant overlap is not anticipated.

Grapes (Green)

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

Grapes (Red)

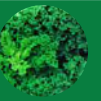
| Commodity/Region | Supply | Price | Quality |
|------------------|--------|--------|---------|
| | Steady | \$\$\$ | Good |



Green Onions

Green onion supplies remain strong overall and are expected to stay steady into next week, depending on temperatures.

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



Kale

Kale supplies and quality remain 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

Supply Partners



Commodity Updates



Lettuce Iceberg

ALERT

Demand is exceeding supply and is expected to remain that way through at least the rest of the month. Rain is forecast for the first part of the week, which will further disrupt harvesting. Common quality issues include light weights, misshapen heads, and discoloration. Value-added items are being escalated to second tier, and suppliers will be working to cover orders throughout the week.

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



Lettuce Leaf

Among the major row crop items, romaine along with green and red leaf currently have the best availability. Supplies are moderate at best, but most orders are being filled in full. Romaine hearts have tightened and may require escalation on value-added items by the end of the week, though none is in place at this time. Expect smaller heads and lighter weights, but overall product quality across leaf items remains clean, with minimal tip and fringe burn reported.

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



Lettuce Tender Leaf

Tender leaf items such as spinach, cilantro, and arugula remain in good supply, though some minor insect damage and discoloration are being reported. Supplies are expected to tighten going into next week due to the heat wave in Yuma.

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



Melon (Cantaloupe)

Offshore cantaloupes are currently available in CA, TX, FL, and the Northeast. Pricing has stabilized as retail ads wind down. Mexican cantaloupes are also available, and domestic supplies are expected to begin in May.

| 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 with strong quality.

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



Melon (Watermelon)

Supply from Mexico has improved and pricing has normalized. Promotional deals are expected to emerge as domestic watermelons come into production.

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



Mushroom

Supplies and availability remain excellent.

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



Onions



PNW onions are essentially finished, with a warm winter shortening the season and impacting quality. Texas onion supplies are limited following recent rain over the past two weeks. California is now the primary source, focusing on contract fulfillment while inventory is rebuilt.

| 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 continues to gradually rise in price. Bartletts are finished, easing pressure on the Anjou market. Red pears are in adequate supply, and Bosc pears remain plentiful. New crop California Bartletts are expected to start 2-3 weeks early and may be available in June.

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

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

Supply Partners



Commodity Updates



Pineapples

ALERT

Pineapple supplies are tightening as demand increases. Availability of 6/7ct crowned fruit is expected to be very limited, with another 2-4 weeks needed for improvement. Overall supply is slightly lower than previous weeks, and contracts continue to take priority. Crownless 8ct and 10ct sizes remain tight, and organic pineapples are also limited. Rising bunker fuel costs are expected to impact Q2 pricing. Overall, fruit supplies are expected to remain tight through the end of April.

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



Potatoes

Supply and demand are balanced, with deals available on 40s, 50s, and #2s, while smaller counts are getting tighter. Burbank potatoes are now available with Norkotahs as the main variety. Washington crop is strong on mid sizes, with large and small counts snug. Florida colored potatoes are limited due to freeze impacts. Fuel and trucking costs continue to pressure the market. Yellow potatoes are tight, reds are better supplied, and NC sweet potatoes remain limited until new crop.

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



Squash

Mexico supplies are extremely tight due to reduced plantings, especially in the West. Florida zucchini production is strong, while yellow squash is lighter, pushing prices higher on demand. Georgia is just beginning, with more meaningful volume expected by late April.

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



Stone Fruit

New crop peaches and apricots have begun in California, with nectarines expected to follow in the next one to two weeks. Plums are projected to start by the end of May. Kiwi supplies remain tight as Chile has had a slow start.

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



Tomatoes

ALERT

Supply remains extremely tight due to earlier weather issues in Florida and transition gaps in Mexico. Romas and rounds are especially short, with inconsistent quality, sizing, and packouts limiting usable volume. Grape varieties remain steady and available. Slight improvement is expected later this month, but near-term availability will stay constrained, particularly on rounds and romas. Baja is 2-3 weeks out, and Mexico's new crop in Jalisco has started on romas, with rounds expected in about 3 weeks.

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

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

Supply Partners



Weather Updates



CALIFORNIA

A few showers will linger Wednesday morning before skies gradually clear through the day. Morning lows will range from the mid-30s to low 40s south of King City, and low 40s to low 50s elsewhere, with daytime highs warming into the low 60s to mid 70s. A weak upper low will move through Saturday, deepening the marine layer and cooling temperatures into the low to upper 60s, along with spotty drizzle. High pressure returns Sunday, bringing a warming trend.



MEXICO

Temperatures will gradually warm into the weekend. Shower activity remains isolated, mainly confined to higher terrain and parts of south-central Mexico. Most showers will produce 0.02" to 0.20" of rain, though isolated thunderstorms could bring higher amounts. Highs will run in the mid-70s to mid-80s through Friday, warming into the low 80s to low 90s over the weekend. Morning lows will trend cooler in the mid-50s to low 60s through Sunday morning.



FLORIDA

Dry weather is expected Wednesday, with shower chances increasing into the weekend as temperatures also trend warmer later in the week. In northern Florida, morning lows will be in the low to upper 50s through Friday, rising to the upper 50s to low 60s over the weekend. Highs will range from the low to mid 80s through Thursday, then warm into the mid 80s to low 90s from Friday through Sunday. Winds will remain light, generally near or below 20 mph through Friday across southeast Florida and the Tampa Bay area. In central and southern Florida, lows will hold in the upper 50s to mid 60s through Thursday morning, then warm into the low 60s to near 70 from Friday through Sunday morning. Highs will run in the upper 70s to mid 80s through Friday, increasing to the low 80s to low 90s over the weekend.



ARIZONA

Winds will ease to 20–25 mph gusts by sunrise Wednesday and continue decreasing through the afternoon and evening. Thursday and Friday will see lighter gusts in the 15–20 mph range before increasing again Saturday, with west winds of 20–30 mph as another low-pressure system moves through the Great Basin. High temperatures will cool into the 80s across most valleys Wednesday and Thursday, warm into the mid 80s to low 90s on Friday, then cool back into the mid 70s to mid 80s by Sunday afternoon. Morning lows will trend from the mid 50s to low 60s Wednesday, then into the mid to upper 50s Thursday and Friday.

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

Freight Updates



Yuma season is done and Salinas is full go. Freight this week sees increased shipper delays due to newer crops and quality issues at field level. Expect shipper delays to last for the remainder of April.



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

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

| | 04/06/26 | 04/13/26 | 04/20/26 | Change from | | |
|----------------------------|----------|----------|----------|-------------|----------|----------|
| | | | | 2 year ago | year ago | week ago |
| U.S. | 5.643 | 5.608 | 5.403 | ↑ 1.411 | ↑ 1.869 | ↓ -0.205 |
| East Coast (PADD1) | 5.740 | 5.674 | 5.494 | ↑ 1.447 | ↑ 1.880 | ↓ -0.180 |
| New England (PADD1A) | 5.997 | 6.024 | 5.862 | ↑ 1.536 | ↑ 1.929 | ↓ -0.162 |
| Central Atlantic (PADD1B) | 5.980 | 5.996 | 5.924 | ↑ 1.669 | ↑ 2.105 | ↓ -0.072 |
| Lower Atlantic (PADD1C) | 5.624 | 5.518 | 5.297 | ↑ 1.356 | ↑ 1.792 | ↓ -0.221 |
| Midwest (PADD2) | 5.304 | 5.382 | 5.165 | ↑ 1.230 | ↑ 1.690 | ↓ -0.217 |
| Gulf Coast (PADD3) | 5.415 | 5.310 | 5.069 | ↑ 1.362 | ↑ 1.874 | ↓ -0.241 |
| Rocky Mountain (PADD4) | 5.412 | 5.256 | 5.213 | ↑ 1.330 | ↑ 1.736 | ↓ -0.043 |
| West Coast (PADD5) | 6.924 | 6.822 | 6.620 | ↑ 1.959 | ↑ 2.370 | ↓ -0.202 |
| West Coast less California | 6.366 | 6.183 | 6.010 | ↑ 1.856 | ↑ 2.197 | ↓ -0.173 |
| California | 7.567 | 7.559 | 7.325 | ↑ 2.081 | ↑ 2.570 | ↓ -0.234 |

*prices include all taxes

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

Crop Updates



Rain, Transition Gaps, and Berry Demand Keep Markets Tight

This week wasn't without its own set of challenges.

With processors now fully operating in Salinas, the region was immediately met with rain across key Central Coast growing areas including Salinas Valley, Santa Maria, and Oxnard. Growers packed ahead of the weather to help cover orders, but wet fields and muddy conditions slowed harvest activity and will likely create lingering quality concerns in the days ahead.

Rain totals were enough to disrupt normal operations, and as fields dry out we expect the usual post-rain issues to surface: elevated dirt, mildew pressure, shorter shelf life, bottom rot, pin rot in broccoli, and quality pressure on cauliflower and leafy items.

The broader row crop market remains tight, and April continues to shape up as a light supply month. The combination of recent rain, prior heat in Salinas, and the finish of Yuma has left little cushion in the system.

Value-added processors are already feeling the pressure, particularly on lettuce, broccoli, cauliflower, and celery. Expect lighter weights on lettuce and leaf items, while broccoli and cauliflower may show more discoloration and weather-related defects.

Iceberg remains one of the more challenged items. Yields are declining due to increased Fusarium pressure, a soilborne disease favored by warm, wet conditions. Some growers are reporting losses in early plantings, tightening an already snug market. Romaine and leaf items currently have better availability, though markets are expected to strengthen as the week moves on.



Crop Updates



Berries are also facing their own transition challenges.

Oxnard is now well past peak and trending down seasonally, reducing output from what had been a major source of volume. Santa Maria is ramping up, but cooler weather and smaller berry sizing are keeping yields lighter than hoped. Further north, Salinas and Watsonville started early this season, but recent rain and cooler temperatures have slowed momentum after the initial flush of fruit in early April.

The result is a market where multiple regions are producing, but not enough volume is available to fully satisfy demand. Strawberry supplies remain light, and pricing is elevated as buyers compete for limited numbers.

Across the rest of the berry complex, raspberries remain in a demand-exceeds-supply situation, though some gradual improvement is expected later this month as California hoop production begins. Blueberries are slowly improving as California adds volume, but markets remain elevated until the Pacific Northwest starts in mid-May. Blackberries remain light, though pricing has started to ease slightly.

Tomatoes round out the list of challenged items this week.

Supply remains tight due to earlier weather issues in Florida and transition gaps in Mexico. Romas and rounds are especially short, while quality remains inconsistent with sizing and packouts limiting usable volume.

Some improvement is expected later this month, but for now round tomatoes remain one of the most expensive items in the market, with prices staying at extreme levels.

