

The Source

Commodity of the Month - Romaine

MARKET ALERTS

Brussel Sprouts: Remain very tight; Salinas and Oxnard face insects, decay, and small sizes.

Cantaloupe: Westside deal ends; Florida offshore fruit starting. Domestic cantaloupe prices high due to low yields, mainly 9s, with sizing and cosmetic issues.

Cauliflower: Supplies remain limited as Salinas season ends.

Celery: Heavy rain slows production; Salinas done, Yuma after Christmas. Value-added items priced higher; limited availability all sizes.

Grapes: Strengthening: green tight, some finished; reds available into mid-December. Peruvian imports arriving, volumes rising late Nov-early Dec.

Lettuce (iceberg): Yuma slightly better, Huron finishing; value-added lettuce prices remain high, with defects and 34-38 lb cartons.

Lettuce Tender Leaf: Supplies remain very tight from low yields; limited this week.

Pineapple: Costa Rica storms limit pineapples through early Nov; crownless in high demand. Prices rising, potential substitutions, cancellations, and port delays.

Strawberries: California needs 7-10 days to recover from heavy rain; Santa Maria likely done. Markets tight. Central Mexico increasing, Florida starting small volumes, Baja in ~2 weeks.

Tomatoes: East cooler with brief freeze; romas tight, rounds adequate. Central Mexico mainly via McAllen; eastern grapes tight. Active markets through next week.

NOVEMBER 19, 2025

CROP UPDATES

Yuma lettuce improving; Salinas hit by heavy rain, ending harvest. Central Mexico, Baja, and Florida easing shortages. Strawberries low yield, celery slowed by wet fields. Brussels sprouts tight. Idaho potatoes strong, but freight limited. Overall, desert production rising ahead of holidays. [Read more](#)

WEATHER

California: Clouds increase Wednesday with a low-pressure system. Light showers overnight through early Friday (¼"-¾"), then clearing with highs upper 50s-low 70s and inland lows mid-30s over the weekend.

Mexico: Warm and mostly dry, highs mid-70s-mid-80s, lows upper 40s-upper 50s.

Florida: Warm and mostly dry through Sunday, highs upper 70s-mid-80s, lows 50s-60s, winds 15-20 mph.

Arizona: Wetter week ahead with showers midweek through Saturday; dry Sunday. Highs low-mid 60s Friday, warming mid-60s-mid-70s Sunday; lows mid-upper 40s, rising to ~50.

FREIGHT

Salinas season ends this week; Yuma starts 11/17. Expect 48-hour dwell times and loading delays as northern product fills the pipeline. Truck market will be active this winter; updates and solutions forthcoming.

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LOGISTICS

IN PEAK SEASON

- Avocado
- Orange
- Pears
- Potatoes



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Commodity Updates



Apples

No changes in the apple market. Packouts continue to skew toward larger sizes, leaving smaller apples in limited supply. Sizes 125 and 138 remain available, though inventories are tight, while 113s and 100s are more readily accessible.

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



Asparagus

Mexico is meeting demand, though markets are slow and quality is mixed. Cooler weather is helping, and volume stays steady until Caborca ramps up in January.

Peru is working through last week's backlog, with demand dropping after Wednesday and fewer arrivals ahead. Southern fields are ending, northern volume starts Dec 5, and big sizes will stay tight into early 2026.

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



Avocados

Markets remain soft with ample fruit and lower demand. Flora Loca and Aventajada are currently being harvested and shipped, both with dry matter and oil content in the mid-to-high 20s.

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



Bell Peppers

Recent rain in Coachella has delayed harvest, tightening supplies of both red and green bells, with reds especially limited due to delayed first picks. Tight supplies are expected through next week. More green bells are starting to arrive from Nogales, with additional shippers coming online next week and higher volumes expected by the first week of December.

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

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

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Commodity Updates



Berries (Blackberries)

Production levels remain steady out of CMex and Baja, and overall quality has been strong. Most of the supply is being routed to distribution points on both the East and West Coasts.

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

Peruvian supplies are past their peak, though additional containers are still on the way, keeping markets steady. Central Mexico is increasing production through McAllen, Texas, and quality has been very good from both regions. We expect these conditions to hold as we move into December.

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

No significant changes from last week. Fruit supplies out of Baja and CMEX remain strong, markets are steady, and quality continues to be good.

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

ALERT

After four days of rain, with some areas receiving up to six inches, California will need several days to dry out and recover. Most shippers expect this process to take 7-10 days. Santa Maria is likely finished for the season following this weather event. Markets are currently in a demand-exceeds-supply situation. Central Mexico is increasing production, but not quickly enough to offset the present shortage. Florida is just beginning to see very small pallet volumes, with more meaningful quantities expected after the Thanksgiving holiday. Baja is projected to begin production in about two weeks.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Light	\$\$\$	Poor
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Broccoli

Broccoli supplies are slightly limited as Salinas winds down and recent rains impact harvests. Expect the market to firm and inch up heading into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	High	\$\$\$	Good
Santa Maria, California (Year Round)	Light	\$\$\$	Fair
Salinas California (Year Round)	Light	\$\$\$	Fair



Brussel Sprouts

ALERT

Brussels sprout supplies remain extremely tight, with Salinas Valley and Oxnard growers still facing heavy insect pressure, some decay, and generally smaller sizing.

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



Carrots

Harvest continues in the Cuyama/Lancaster region through November, with Bakersfield up next. Cellos and Jumbos remain tight due to recent heavy rain limiting harvest. Please place snack-pack orders at least 48 hours in advance.

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 remain limited as the Salinas season winds down. Expect tight availability this week and into next.

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



Celery

ALERT

Heavy rains in Southern California have slowed production for this commodity. Harvesting in Salinas has concluded, and Yuma is not expected to begin until after Christmas. Pricing on all value-added items has escalated to the second tier. Availability across all sizes remains limited and is expected to stay tight throughout the week.

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

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

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Commodity Updates



Citrus (Grapefruit)

Marsh Rubies are available, peaking on 48ct, and shipping 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)

Market conditions are improving as District 1 (San Joaquin) begins light harvest, though fruit still needs a few days of gassing to color, similar to navels. Volume should build as nights cool. District 3 (CA Desert/AZ) remains the primary region, but its volume will taper over the next few weeks. Sizes 140ct and smaller remain extremely limited. Mexico is also harvesting, so reach out if you need fruit available for loading in South Texas.

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)

Markets are slightly higher. Heavy rain in Veracruz is reducing yields heading into the new year. Fruit continues to peak on 110/150cts with some quality issues, including styler. The new crop cycle begins in January.

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



Citrus (Oranges)

Navels are in full swing, with markets leveling off after recent heavy Central Valley rains. Current peak sizes are 113ct, 88ct, and 138ct, shifting toward 72ct as the season progresses, with smaller sizes tightening into December/January. Gas times are around 2 days, with brix at 11-12. Cooler nights are helping reduce gassing time.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (Year Round)	High	\$\$\$	Good



Cucumber

Cold eastern temperatures are slowing Florida cucumber production. Offshore Honduran cucumbers are expected in December, as Florida typically sees lower winter acreage. Western FOBs remain steady with moderate Sinaloa production.

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

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

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Commodity Updates



Eggplant

Eastern supplies are light due to cooler Florida temperatures. More volume is arriving from Sinaloa through Nogales, with good quality from Mexico.

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



Garlic

The California garlic crop is progressing with good quality, complemented by ongoing Mexican supplies.

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



Grapes

ALERT

The grape market is expected to continue strengthening throughout the month. Domestic green varieties are tightening more quickly than reds, with some shippers already finished for the season. Others packing from storage anticipate having greens available through the last week of November. Most shippers project domestic red supplies will carry into the first half of December.

Peruvian imports have already begun arriving on the East Coast, and volume on both coasts is expected to increase in the last week of November or the first week of December.

Grapes (Green)

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

Grapes (Red)

Commodity/Region	Supply	Price	Quality
Mexico (May - June)	High	\$\$\$	Good



Green Onions

Green onion supplies have improved, though the market is expected to stay slightly elevated into next week.

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



Kale

Kale supplies and quality remain strong, with similar conditions expected 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

ALERT

Yuma production has improved slightly, but demand still exceeds supply. Huron production is light and finishing this week. Elevated pricing remains on all value-added lettuce through the week. Common defects include light weights, rib discoloration, and misshapen heads, with carton weights ranging 34–38 pounds.

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



Lettuce Leaf

Supplies of romaine, green leaf, red leaf, and butter lettuce are improving out of Yuma, with romaine heart production also picking up. However, all value-added leaf items remain on elevated pricing for at least the week. Quality issues reported include tip and fringe burn, discoloration, and light weights. Production is currently ongoing in Yuma.

Commodity/Region	Supply	Price	Quality
	Light	\$\$\$	Fair



Lettuce Tender Leaf

ALERT

Tender leaf supplies remain very tight due to low yields from insect pressure and recent hail, and are expected to stay limited this week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair
Oxnard, California (Year Round)	Light	\$\$\$	Fair
Yuma, AZ (Nov. - May)	Light	\$\$\$	Fair



Melon (Cantaloupe)

ALERT

The Westside deal wraps up this week as suppliers begin bringing in offshore fruit via Florida, with other ports to follow. Domestic cantaloupe prices remain elevated due to lower yields from recent rain. Markets are high with triggers in place until supplies improve. Fields are mainly producing 9s, with sizing expected to be challenging for the rest of the season, and some cosmetic issues are present from the weather.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	Steady	\$\$\$	Good

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

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Commodity Updates



Melon (Honeydew)

Honeydews are available from both domestic and Mexican sources. Offshore supplies are light this week but expected to improve, with fields mainly producing sizes 4, 5, and 6.

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



Melon (Watermelon)

Domestic watermelon supplies are nearly finished, with most product staying local due to pressure levels. Prices are steady, with Mexican watermelons from Nogales supplying the Midwest and East Coast. Limited Mexican watermelon is also available via Texas and Nogales, with last month's rain impacting production.

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



Mushroom

Supplies are tightening ahead of the holidays, though quality remains excellent.

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



Onions

Onions are available from WA, ID, and UT, with strong domestic demand. All product is in storage, and market conditions for the rest of the year will be driven by trucking and weather. Rain in Idaho may impact transit, making reefer and rail the preferred transport methods, while flatbeds are not recommended.

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 remains steady, with strong production of Anjous, Bartletts, Bosc, and Red varieties. Foodservice sizes are plentiful across all types.

Commodity/Region	Supply	Price	Quality
Hood River, Oregon (August-July)	Light	\$\$\$	Good
Yakima, Washington (August-July)	Light	\$\$\$	Good

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

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Commodity Updates



Pineapples

ALERT

Thunderstorms in Costa Rica are impacting pineapple growing regions through late October into early November 2025. Supplies remain very limited and are expected to continue tight for the rest of the year. Crownless pineapples remain in high demand. Expect substitutions, cancellations, and order changes. Pineapple prices will rise this week due to the holidays, and port delays may affect loading schedules.

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



Potatoes

Harvest is complete and in storage, with good supplies and steady demand for the holidays. Burbanks are emerging, Norkoths remain main. WA potatoes are high quality, mid sizes peak, large/small tight. Trucking may impact loading, and NC new crop sweet potatoes are starting.

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



Squash

Mexico: Zucchini steady; yellow squash tightens after heavy supplies, pushing mid-month prices up.

Georgia: Production stops this week due to freeze.

Florida: Light volumes; Atlantic fields mostly spared. Mexico drives supply as markets rise.

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



Stone Fruit

Imported peaches and nectarines are expected to begin arriving on both coasts around mid-December. Pomegranates, persimmons, and Asian pears will be in strong supply throughout November and December. The domestic kiwi market is projected to remain steady, though at elevated price levels.

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



Tomatoes

ALERT

East: Cooler weather slows production, with a brief freeze in N. FL/S. GA and Central FL temps in the 30s. Markets are firm, especially on romas. Baja has adequate rounds but romas are tight. Most Central Mexico supply crosses through McAllen, with little in Nogales. Eastern grapes are tight and prices higher. Expect an active market through next week.

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

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

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Weather Updates



CALIFORNIA

Clouds increase Wednesday as a low-pressure system approaches. Morning lows will range from the mid-30s south of King City to upper 30s–low 50s near the coast, with daytime highs in the mid-50s to mid-60s. Light to moderate showers start overnight and continue through early Friday, totaling $\frac{1}{4}$ "– $\frac{3}{4}$ ". Skies clear Friday, with inland lows returning to the mid-30s and highs reaching upper 50s to low 70s over the weekend.



MEXICO

Warmer and mostly dry conditions expected, with only isolated light showers. Highs will range from mid-70s to mid-80s through Sunday, and lows from the upper 40s to upper 50s.



FLORIDA

Warm weather continues through Sunday, with highs in the upper 70s to mid-80s. Lows will range from the low 50s to near 60 in northern Florida, and upper 50s to upper 60s in central and southern Florida. Winds gust 15–20 mph through Nov 21 in Southeast Florida and Tampa Bay. Mostly dry, with only isolated sprinkles expected.



ARIZONA

The forecast is trending wetter this week with two passing cut-off low-pressure systems. Most Wednesday rain targets central Arizona, with isolated light showers possible in Yuma and Imperial Valleys through midday. Light rain lingers over central Arizona Thursday, with showers returning to southeast California by late Thursday and spreading across Arizona Friday, tapering off Saturday evening. Sunday should be dry across all valleys.

Highs cool to the low–mid 60s by Friday, warming to mid-60s–mid-70s by Sunday. Morning lows drop to mid–upper 40s Thursday, gradually warming to around 50 by Sunday.

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



Freight Updates

Salinas season draws to a close this week with Yuma slated for 11/17 start. Expect Value Added suppliers to continue to fill the pipeline with product from the northern growing regions creating loading delays in Yuma. We are anticipating 48 hour dwell times in Yuma week of 11/17. Be prepared to wait for your product in Yuma. We are also expecting a very active truck market in Yuma this winter and are working on some creative ideas to circumvent the political setbacks affecting the truck market. Stay tuned for that or reach out to our team for more info for the time being.



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

[full history](#) XLS

	11/03/25	11/10/25	11/17/25	Change from	
				week ago	year ago
U.S.	3.753	3.837	3.868	↑ 0.031	↑ 0.377
East Coast (PADD1)	3.754	3.823	3.856	↑ 0.033	↑ 0.304
New England (PADD1A)	3.936	3.955	4.021	↑ 0.066	↑ 0.270
Central Atlantic (PADD1B)	3.908	3.956	3.999	↑ 0.043	↑ 0.227
Lower Atlantic (PADD1C)	3.678	3.761	3.787	↑ 0.026	↑ 0.336
Midwest (PADD2)	3.773	3.891	3.913	↑ 0.022	↑ 0.447
Gulf Coast (PADD3)	3.374	3.436	3.490	↑ 0.054	↑ 0.337
Rocky Mountain (PADD4)	3.676	3.803	3.813	↑ 0.010	↑ 0.355
West Coast (PADD5)	4.499	4.545	4.559	↑ 0.014	↑ 0.410
West Coast less California	4.121	4.161	4.180	↑ 0.019	↑ 0.474
California	4.933	4.988	4.996	↑ 0.008	↑ 0.337

*prices include all taxes

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



Crop Updates

Rain Soaked Holiday Pressure

After weeks of talking transition, we've officially made it to Yuma. And while the weather seems to have followed us south, there's finally a sense of relief in the lettuce patch. Early desert romaine and leaf are coming in stronger and cleaner than the final Salinas lots. Yields are still light, and weights will take some time normalize, but this product has legs.

That's good news, because the Central Coast got absolutely soaked last week. Some areas picked up over 6 inches of rain, essentially ending Salinas and leaving Santa Maria and Oxnard berry growers digging out from waterlogged fields. Strawberry yields will remain low for the next three weeks. Oxnard is holding steady for now, but it's not enough to offset the sharp decline elsewhere. Fruit is soft with elevated bruising and mildew pressure. Supplies out of Central Mexico are picking up slowly but still running behind historical trends. Baja is still behind on production and Florida is starting to scratch the surface of their crop. Open market availability remains limited heading into Thanksgiving.

Oxnard is also the primary celery region this time of year, with transfers headed to Yuma. While celery tends to thrive with moisture, soaked fields are slowing harvest. Crews are doing what they can, but product is heavy and hard to move in the thick mud.

Brussels sprout supplies remain limited as the crop transitions south. Rain, rising demand, and the coastal-desert gap are keeping markets snug, especially on value-added packs. Quality has been fair.

Central Mexico supplies have helped stabilize multiple categories. Harvests and crossings remain seasonally light but are providing some relief in berries and wet veg.

And what would Thanksgiving be without Idaho potatoes? Quality is excellent and supplies are strong, but outbound transportation is a growing concern. Carrier capacity out of the Northwest remains tight, and high freight costs on low FOBs continue to slow movement.

The desert is up and running. Product is improving. And while we're still navigating a few bumps - weather, freight, and tight availability - we're headed in the right direction into the holidays.



JOEY PIEDIMONTE
SOURCING MANAGER