

The Source

Commodity of the Month - Apples

MARKET ALERTS

Asparagus: Large sizes remain tight coast-to-coast; smalls and standards more available. Peru's cool slows growth; Mexico faces heat and rain. Asparagus tight through mid-September, improving later.

Blueberries: Pacific Northwest production ends next week; Peruvian and Mexican volumes rising. Markets starting to climb.

Broccoli: Broccoli supplies tight due to pin rot and pests; market set to rise next week.

Citrus (Lemons): Markets strong; District 2 only region. Small sizes limited. Quality fair; shippers culling. Demand high, imports low. Offshore and Mexican supplies light, Mexico down yearly.

Citrus (Oranges): Valencias peak at 88ct; larger sizes scarce. Market rising; gas times ~3 days. Quality fair, mostly choice grade. Navel season starts late October.

Pineapple: Thunderstorms hit Costa Rica through mid-September, limiting pineapple supply for the year. Crownless pineapples are in high demand with likely order changes. Mexican supply limited. Holiday port delays expected early September.

IN PEAK SEASON:

- Blackberries



- Raspberries



- Grapes



SEPTEMBER 3, 2025

CROP UPDATES

Heat is boosting yields but causing more insect and disease issues in California crops. Baby leaf veggies show yellowing; broccoli faces pests and rot. Iceberg and romaine weights improve, easing prices slightly. Pest pressure and heat shorten harvest windows, increasing variability. Celery, cilantro, and romaine quality remain good, but heat adds stress. Close field monitoring and strong cold chain are essential. [Read more](#)

WEATHER

California: Weak upper low moves out Wednesday; marine layer thins then thickens. Morning lows mid-40s to upper 50s. Highs: 60s-70s coast, 80s valleys, 90s-102 south of Soledad. Cooler by Friday through weekend.

Florida: Showers and storms through the weekend near a stalled front, with light to moderate rain and some heavy spots. Highs 80s-90s; lows mid-60s-70s. Winds gust 15 mph, stronger in storms.

Mexico: Showers and storms through Thursday, some heavy; then isolated Friday-Sunday. Central Mexico stays warm with highs 70s-80s, lows mid-50s-60s.

Arizona: Showers and storms fueled by Tropical Storm Lorena will increase Wed-Fri in SE CA and W AZ, with moderate severe risk. Drying starts Sat; dry Sun. Temps near/below normal highs, above-average lows.

FREIGHT

Freight this week sees challenges loading from California heading to Florida with elevated rates. Expect tighter capacity from Idaho as very few trucks are unloading it the direct region and capacity has to transit to pickup. California is steady on truck supplies for the next 4 weeks as the fresh supply chain sees plenty of product to fill the pipeline.

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Commodity Updates



Apples

The apple market continues its slow, steady shift from old crop to new. Granny Smith and Fuji are being pushed to the limit, with the last remaining storage rooms yielding every possible carton—but still falling short of demand. Gala movement is expected to gain momentum this week and next, while Honeycrisp are packing in solid volume. Even so, the market will need time to recalibrate before demand improves. September will usher in fresh supplies of Granny Smith, Red Delicious, Fuji, and Ambrosia.

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



Asparagus

ALERT

Large, Extra Large, and Jumbo sizes remain limited on both coasts, while Smalls and Standards are more available. Supplies overall are tight, keeping the market up. Cooler weather in Peru is slowing growth, and Mexico is dealing with heat and some rain. Asparagus will stay tight into mid-September, with better volume expected by the second or third week.

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



Avocados

Peak sizes are 48ct and 60ct, with Flora Loca now the main crop as the old crop is nearly done. Dry matter is in the mid-20s, compared to low 30s on the older crop, so expect longer ripening times. Fruit is very clean, with minimal #2 grade—typical for this part of the season. The California season continues to slow and is expected to wrap up in the next few weeks. Offshore arrivals are hitting both coasts but should begin to wind down next month.

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



Bell Peppers

Eastern production remains steady with solid quality. Western and California regions are delivering excellent quality and strong supply, with promotable volumes available. Colored bell availability is improving as the market works to find its footing.

Commodity/Region	Supply	Price	Quality
California (May - June)	Steady	\$\$\$	Excellent
Ohio (Jun - Sept)	Steady	\$\$\$	Excellent
Mexico (Jun - Sept)	Steady	\$\$\$	Excellent

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

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Commodity Updates



Berries (Blackberries)

Steady movement on this item with good availability out of both California and Central Mexico.

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



Berries (Blueberries)

ALERT

Production in the Pacific Northwest will wrap up next week. Peruvian and Mexican volumes are expected to increase gradually over the next two weeks. Markets are beginning to react higher.

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



Berries (Raspberries)

Strong production out of Mexico is putting downward pressure on market pricing. Steady volumes from Baja and Central Mexico are expected to continue throughout September.

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



Berries (Strawberries)

Production in the North remains solid, with Santa Maria gaining strength and expected to peak in late September. Last week's heat wave in both regions may impact quality, and crews are moving carefully through the fields to minimize issues in the pack out.

Commodity/Region	Supply	Price	Quality
California (Year Round)	High	\$\$\$	Fair

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

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Commodity Updates



Broccoli

ALERT

Broccoli supplies are slightly limited as fields show signs of pin rot and Diamondback Moth larvae, leading to reduced yields. Expect the market to gradually trend upward heading into next week.

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



Brussel Sprouts

Brussels sprout supplies are still somewhat light but improving. Overall quality is good, with only occasional insect damage. The market is expected to ease gradually heading into next week.

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



Carrots

Harvest has shifted to the Cuyama and Lancaster areas, where it will continue through November. This week looks better as crews are getting into fields with improved sizing. No sizing issues are expected in the near future, but updates will be shared if anything changes.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	High	\$\$\$	Excellent
Kern County (October - Feb)	Steady	\$\$\$	Good
Various Northwest Regions (July - October)	Steady	\$\$\$	Good



Cauliflower

Cauliflower supplies remain steady and strong despite some insect damage. Expect the market to hold steady through the weekend.

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



Celery

This market remains steady, with all sizes available both north and south. Shippers are still flexible, and overall quality continues to be above average, with only minimal reports of seeders. Demand is moderate at best.

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 at 48ct, 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)

ALERT

Markets remain strong across all sizes, with District 2 (Ventura/Oxnard) as the sole growing region. Smaller sizes (165ct and under) are very limited. Choice grade dominates, with less Fancy due to growing conditions. Quality is fair, with softer fruit and early decay common from coastal winds and moisture. Shippers are working to cull affected fruit. Markets are higher than last summer, driven by strong demand and reduced imports. Offshore and Mexican supplies are arriving lightly, with Mexico down year over year.

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)

The market has softened post-holiday. Current crop shows weak shelf life, larger fruit, and some quality issues. A new production cycle is beginning, bringing smaller fruit, better color, and slightly improved shelf life, though oil spotting remains a concern. Market volatility is expected through September. Offshore fruit is available, with pricing still trailing Texas FOBs.

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



Citrus (Oranges)

ALERT

Valencias are peaking on 88ct, with 113ct and 138ct very limited due to school demand. Suppliers may ask to sub up soon. The 88ct market is rising as larger sizes become scarce. Gas times are about 3 days, but warmer weather is causing some regreening. Quality is fair, mostly choice grade, and shippers are culling compromised fruit. Brix is around 13, with good eating quality. The Navel season is expected to start late October.

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



Cucumber

Eastern supplies are lighter but meeting current demand. Production is expected to ramp up in North Carolina and Georgia within 7-10 days. The West and Mexico continue to provide a steady supply.

Commodity/Region	Supply	Price	Quality
Baja California (May - October)	Steady	\$\$\$	Good
Ohio/NC/MI/NJ (June - September)	Steady	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good

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

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Commodity Updates



Eggplant

Steady supply from MI, NJ, and NY with good quality. NC harvest set to begin soon. California remains steady but supplies are tight. Demand is strong, keeping the market firm.

Commodity/Region	Supply	Price	Quality
Ohio/NC/MI (June - September)	Steady	\$\$\$	Good
California (May - October)	Steady	\$\$\$	Good



Garlic

The new California garlic crop is progressing well 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 (Green / Red)

The grape market is pushing toward higher prices as stronger late-season varieties come online, increasing upward pressure.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies remain steady and good, with similar conditions expected into next week.

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



Kale

Overall quality is strong, though some larger, thicker stems are showing due to warmer weather. There's also a slight increase in insect damage. Expect the market to stay steady through the weekend.

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

Supplies in the Salinas Valley have improved compared to the past few weeks. INSV impacted yields for many shippers. Current weights range from 38 to 42 pounds. Some misshapen heads and outer leaf discoloration have been reported on arrivals. Escalation is currently applied to the first tier of all value-added lettuce items.

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

Demand is steady for romaine, green leaf, and red leaf. Romaine hearts are slightly softer than in previous weeks. Tip and fringe burn are likely on arrivals due to warm growing temperatures. Weights and product length are expected to be normal for most leaf items.

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

Good overall quality is being reported despite the warmer temperatures over the weekend. Supplies are expected to remain mostly steady into next week.

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, AZ (Nov. - May)	Steady	\$\$\$	Good
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Melon (Cantaloupe)

The domestic cantaloupe market is starting to firm up as Westside fields move into better sizing. The second cut and rising demand are driving the market higher. Fields are still mostly producing 9s, but sizing on 12s and 15s is improving, while jumbos are tightening. Brix levels range from 13 to 16. Unexpected rain in the Central Valley this week has affected some fields, and crews are working to manage the damage.

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)

The domestic honeydew market is heating up as Westside fields move into better sizing. The second cut and stronger demand are pushing the market. Fields are still mainly producing 5s, but sizing on 6s and 8s is improving. Brix levels range from 13 to 16. Volume deals are available.

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

Domestic watermelons are available from both the west and east coasts. Prices are starting to stabilize as growers push new crops. Post-holiday deals will be available.

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

Excellent supply and availability with strong promotable volumes.

Commodity/Region	Supply	Price	Quality
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Nationwide	High	\$\$\$	Good
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Onions

Onions are currently available from Washington and Idaho, as the California and New Mexico seasons have ended. Demand remains strong across the U.S. Rain in Idaho during the week of 8/25, combined with the holiday, caused some shippers to pause harvesting for a few days.

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

Washington Bartlett pears are in full swing, while California Bartletts remain aggressively priced and will continue to impact the market for the next few weeks. Red pears are being packed in both states, and California Bosc pears are available in heavy volume.

Commodity/Region	Supply	Price	Quality
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Sacramento Valley (July-September)	Light	\$\$\$	Good
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 continue to affect growing regions in Costa Rica and are expected through mid-September 2025. Pineapple supplies remain very limited and may stay tight for the rest of the year. Crownless pineapples are in high demand, so expect substitutions, cancellations, and order changes. Mexican pineapples are available but limited. Port delays during the week of 9/1/2025, due to the holiday, will impact loading schedules.

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



Potatoes

The Idaho market is improving on 40-70 count with new crop potatoes. Burbanks are nearly done; Norkoths are now the main variety. New fields are mostly #1s, with #2s tight for about a month. Washington's new crop shows great quality. Color potatoes are available from CA, ID, MN, WA, and WI. New crop sweet potatoes are starting small in NC, with some curing issues to settle over the next few weeks.

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



Squash

Supplies remain steady across both Eastern and Western regions. New Jersey is winding down, while the Georgia crop is now underway. Overall quality is solid.

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



Stone Fruit

Peaches, plums, and nectarines are in moderate supply with a stable market. Imported kiwi remains steady but priced higher, likely holding until California's season begins in October. Asian pears from Kingsburg will start soon and continue through year-end.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (May-October)	Steady	\$\$\$	Good



Tomatoes

Roma Tomatoes: Steady Eastern supply with good quality; volumes from Mexico and California expected to increase mid-to-late September.

Round Tomatoes: Eastern production is ramping up with strong quality, supported by North Carolina and California for a smooth transition.

Grape Tomatoes: Volumes are improving with solid quality, and consistent availability from Mexico, Baja, and California.

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

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

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Weather Updates



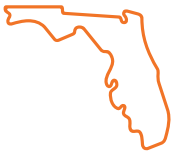
CALIFORNIA

A weak upper-level low that brought deep marine layer conditions on Tuesday will move out Wednesday, allowing the marine layer to weaken to moderate levels before gradually thickening again later in the week. Morning lows will range from the mid-40s to upper 50s. Daytime highs Wednesday will reach the upper 60s to low 70s near the coast, low to mid-80s in the coastal valleys, and mid-90s to 102 south of Soledad. By Friday, highs will cool to the mid-70s to low 80s in the coastal valleys and remain in the mid-80s to mid-90s south of Soledad through the weekend.



MEXICO

Isolated to scattered showers and thunderstorms are expected through Thursday, with most rainfall totals between 0.05" and 0.30", though some thunderstorms could bring 1" to 2" of rain. From Friday through Sunday, showers will become more isolated according to recent short-range forecasts. Central Mexico will see seasonably warm temperatures over the weekend, with highs in the low 70s to low 80s and lows ranging from the mid-50s to low 60s through Sunday.



FLORIDA

Isolated to scattered showers and thunderstorms are expected through the weekend, centered around a stalled frontal boundary. Most precipitation totals will range from 0.05" to 0.30", with higher amounts possible in some thunderstorms. Highs will be in the upper 80s to low 90s through Thursday, rising to the low to mid-90s Friday through Sunday. Lows will range from the mid-60s to mid-70s through Thursday, then settle in the low to mid-70s for the weekend. Winds will gust near 15 mph through Friday, with stronger gusts possible within thunderstorms.



ARIZONA

Scattered showers and thunderstorms will continue moving south to north across southeast California and western Arizona Wednesday, with coverage and rainfall expected to increase Thursday and Friday. This activity is being fueled by moisture from Tropical Storm Lorena approaching Baja from the south. There is a moderate risk of strong to severe storms, which could bring damaging winds, blowing dust, and localized flash flooding. The atmosphere will begin drying out Saturday, leading to dry conditions on Sunday. Due to widespread cloudiness and higher humidity, daytime highs will remain near or below normal through the weekend, while morning lows will be near to above average.

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

Freight Updates



Freight this week sees challenges loading from California heading to Florida with elevated rates. Expect tighter capacity from Idaho as very few trucks are unloading it the direct region and capacity has to transit to pickup. California is steady on truck supplies for the next 4 weeks as the fresh supply chain sees plenty of product to fill the pipeline.



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

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

	08/18/25	08/25/25	09/01/25	Change from	
				week ago	year ago
U.S.	3.713	3.708	3.734	↑ 0.026	↑ 0.109
East Coast (PADD1)	3.733	3.726	3.750	↑ 0.024	↑ 0.064
New England (PADD1A)	3.969	3.968	3.948	↓ -0.020	↑ 0.029
Central Atlantic (PADD1B)	3.908	3.916	3.912	↓ -0.004	↑ 0.004
Lower Atlantic (PADD1C)	3.643	3.631	3.669	↑ 0.038	↑ 0.089
Midwest (PADD2)	3.702	3.698	3.722	↑ 0.024	↑ 0.109
Gulf Coast (PADD3)	3.340	3.328	3.367	↑ 0.039	↑ 0.102
Rocky Mountain (PADD4)	3.757	3.748	3.753	↑ 0.005	↑ 0.163
West Coast (PADD5)	4.455	4.461	4.484	↑ 0.023	↑ 0.191
West Coast less California	4.094	4.103	4.112	↑ 0.009	↑ 0.216
California	4.871	4.873	4.914	↑ 0.041	↑ 0.165

*prices include all taxes

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

Crop Updates



Heat Lifts Yields, Insects Rise

Another round of heat has rolled through California this week, and it is keeping pressure high across the board. Crews in Salinas and Santa Maria are still starting early to beat the worst of the afternoon temps, but with the heat sticking around, it is beginning to wear on the crops.

We are seeing a steady uptick in heat-related challenges. Baby leaf items like arugula and spinach are showing more yellowing and wilting, and broccoli is now dealing with pin rot, thicker stems, and more insect pressure, especially from diamondback moth and aphids. Spring mix and romaine supplies are holding up well, but fringe burn and mildew are popping up more frequently. On the upside, the warmer weather has helped push growth in iceberg and romaine, bringing up weights and slightly improving yields. This has translated into some recent price easing, especially on iceberg. How long that trend lasts remains to be seen. Disease pressure and insect activity are still very much present, and it would not take much for markets to firm up again if clean lots become harder to come by.

Pest counts continue to climb across the valley. Thrips and aphids are especially active, and the current weather conditions are ideal for them to spread. Warm nighttime temperatures are also pushing plant maturity faster, which shortens harvest windows and increases variability in the field.

That said, we are still seeing good products come through in many areas. Celery and cilantro are holding strong, and romaine continues to show good heart material and consistent weight. Growers are working hard to manage quality and keep crews safe, but there is no question that this heat stretch is adding stress to an already tight finish in Salinas.

Now is a good time to stay close to the field and keep rotation tight. And as always, maintaining the cold chain will go a long way in protecting quality until it ends up on our forks.



JOEY PIEDIMONTE
SOURCING MANAGER