

The Source

Commodity of the Month - Lemons

MARKET ALERTS

Asparagus: Peru is filling the Mexico gap with small, ocean-shipped asparagus; Mexican supplies are tight, prices high, and Sonora production delayed.

Brussel Sprouts: Supplies are very limited, with insect pressure, decay, and smaller sizing in Salinas Valley and Oxnard.

Celery: Heavy rains in Oxnard/Santa Maria and light Yuma production are driving prices up, with minor pith and seeder defects.

Citrus (Oranges): Navel oranges peak on 88/72/56ct; smaller 113/138ct fruit is tight. Fog and upcoming rain are affecting harvest and post-harvest handling.

Cucumber: Florida production is low, Honduran imports light, and Nogales supply moderate with steady prices.

Grapes: Grape market shifting to imports; prices high but expected to ease mid-January as volumes increase.

Green Onion: Green onion supplies are tight from recent rains, keeping the market strong.

Melon (cantaloupe): Offshore and Mexican cantaloupes available; offshore pricey, Mexican tight until New Year.

Melon (honeydew): Offshore and Mexican honeydews available; offshore costly, Mexican limited through year-end.

Pineapple: Pineapples are stabilizing but remain tight on 8/10-count crownless and organic, with possible substitutions and holiday port delays.

IN PEAK SEASON

- Avocados
- Pears
- Oranges
- Potatoes

DECEMBER 31, 2025

CROP UPDATES

January begins with generally calm markets, but celery, green onions, and asparagus remain tight. Weather damage, holiday labor shortages, and seasonal transitions are limiting availability, particularly for Oxnard celery, Mexican green onions, and jumbo asparagus, though conditions are expected to gradually improve as fields recover and new harvests come online.

[Read more](#)

WEATHER

California: Cold Tuesday lows, warming rest of week; highs mid 50s–mid 60s.

Mexico: Frost possible Wed–Thu; lows mid 30s–mid 40s, highs upper 50s–upper 70s, mostly dry.

Florida: Cold mornings and patchy frost through Wed; warming and possible showers by weekend, with 15–20 mph winds.

Arizona: Northerly winds Tue, easing Wed; light desert showers Wed–Fri, dry Fri PM; highs 60s–70s, lows mid 40s–mid 50s.

FREIGHT

Freight this week, the last of 2025 comes with no shortage of excitement. Elevated markets and demand for truck capacity gives us at Pro*Fresh the opportunity to fully exercise every facet of our supply chain solutions all in the name of freshness. Although the challenge of freight is substantial this time of year – We have you covered!



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Commodity Updates



Apples

Apples are trending toward larger sizes, while all varieties remain available. Holiday-related production and packing constraints are limiting supply and are contributing to a gradual upward pressure on pricing.

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



Asparagus

ALERT

Peru is bridging the Mexico gap with increasing volumes, though sizing remains small and most shipments are by ocean, while Mexican asparagus is extremely tight with sharply rising prices and limited availability, and Sonora production is delayed into the New Year.

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



Avocados

Markets are holding steady at lower levels, supported by ample fruit on the trees amid softer demand. Harvesting in Mexico will be minimal this week due to the holiday, and the market impact remains to be seen. Aventajada is the primary crop currently being harvested and shipped, with peak sizing at 48ct and 60ct, and dry matter/oil content in the high 20s to low 30s.

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



Bell Peppers

Red bells remain tight with mixed quality and weather impacts keeping prices elevated, while green bells have strong supply on both coasts and continue to trade at low levels. Near term, red markets are expected to stay high, while green markets remain favorable through the holiday.

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

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

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Commodity Updates



Berries (Blackberries)

With holiday demand softer, there are adequate supplies available to cover orders out of Central Mexico.

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

We are experiencing a brief gap in offshore supplies as Peruvian fruit wraps up and Chilean product ramps up. Meanwhile, increasing production out of Central Mexico is helping keep the market stable.

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)	Steady	\$\$\$	Excellent
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Berries (Raspberries)

Production out of Central Mexico is down due to inclement weather, and markets are firming across all distribution points.

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

Strawberries remain plentiful across all growing regions, with markets flat due to the holiday period. Significant rain is forecast in California this week, which is expected to disrupt harvesting into next week, so we recommend utilizing Texas and Florida loading options over the next 7-10 days.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Steady	\$\$\$	Good
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McAllen (November - May)	High	\$\$\$	Good
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Dover, Florida (Year Round)	High	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Broccoli

Broccoli supplies remain somewhat tight, but the market is expected to ease heading into next week.

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



Brussel Sprouts

ALERT

Brussels sprout supplies remain extremely limited, with Salinas Valley and Oxnard continuing to face insect pressure, some decay, and smaller sizing.

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



Carrots

Harvest is underway in Bakersfield and will continue through February. Jumbo sizes are slightly smaller due to an earlier start in this region following recent inclement weather, though sizing is expected to improve. Grimmway's Georgia program has also begun this week, offering baby peeled, cellos, tables, jumbos, and 2" peeled chunks.

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 are strong across all sizes and regions, with the market expected to remain steady into next week.

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



Celery

ALERT

Heavy rains in the Oxnard and Santa Maria regions have pushed this market higher, with demand exceeding supply throughout the week. Yuma production remains light, keeping all value-added items on the rise. Pith and seeder defects are being reported, though only lightly.

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

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

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Commodity Updates



Citrus (Grapefruit)

Red Rios 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)

Markets are improving as increased harvests from District 1 (San Joaquin Valley) boost overall supply. District 3 (CA Desert/AZ) remains the main growing region with peak sizes of 140ct, 115ct, and 165ct. Mexican production is also underway, so South Texas loading is available. Please reach out if needed.

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)

Lime markets are firm as the current crop winds down and No. 1 fruit becomes tight. Prices are expected to rise through January and possibly February due to declining yields and steady demand. Sizing will fluctuate, with larger fruit now and smaller fruit increasing, and there is some risk of transit-related defects from weather impacts.

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



Citrus (Oranges)

ALERT

Navel oranges are peaking on 88/72/56ct, while 113/138ct fruit has tightened due to recent weather, keeping small fruit scarce and markets strong. Persistent fog in the Central Valley is causing moisture-related harvest and post-harvest challenges, and upcoming heavy rain is expected to further impact picking.

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



Cucumber

ALERT

Florida production is minimal due to cool weather, Honduran imports are light, and Nogales has moderate volume with strong demand keeping prices fairly steady.

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

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

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Commodity Updates



Eggplant

East Coast supplies are tightening from cooler South Florida weather. Mexican volumes are gradually increasing, though sizing is mixed during the transition. Overall quality is good, with smaller fruit more common than 24-count cartons.

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 transitioning from domestic to imported fruit, with domestic greens nearly finished and imports arriving on both coasts. Imported red and green grapes are significantly higher than final domestic prices, expected to remain strong through the holidays, easing back to seasonal levels as larger volumes arrive in mid-January.

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

ALERT

Green onion supplies remain very tight due to recent rains lowering yields, and the market is expected to stay strong into next week.

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



Kale

Kale supplies and quality remain mostly good, with the market expected to stay steady 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

Yuma shippers are reporting improved availability and are flexible on volume orders—promotion is encouraged. There is currently no market escalation. Average weights are 39–43 pounds, and overall quality is above average, with only minimal discoloration or misshapen heads.

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 supplies in Yuma are strong and expected to continue into the new year. Shippers are flexible due to lower demand. Green and red leaf lettuce will have above-average availability, and all leaf items except butter are good for promotion. Value-added leaf items are off escalation for the holidays.

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

Tender leaf supplies and quality continue to improve and are expected to remain strong while favorable weather continues.

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

ALERT

The Westside deal is complete, with offshore and Mexican cantaloupes available. Offshore pricing is elevated due to lower yields and vessel delays, while holiday port schedules may cause further impacts. Mexican cantaloupes remain very tight during the transition from Northern to Southern Mexico, with limited availability expected until the new year.

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)

ALERT

Offshore and Mexican honeydews are available. Offshore pricing is elevated due to vessel delays and lower yields, while Mexican honeydews remain limited as the transition from Northern to Southern Mexico continues through the end of the year.

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 finished, with prices steady. Mexican watermelons from Nogales are supplying the Midwest and East Coast, while limited supplies are available via Texas and Nogales. Offshore watermelons are also arriving in the U.S., but in limited quantities.

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

Supplies and availability are excellent.

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

Onions are available from WA, ID, and UT. Demand remains strong in the U.S., with yellow and red prices steady, while white onion prices are rising.

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



Pears

The pear market is steady across all varieties, with strong production and ample availability, especially in foodservice sizes. Pears are highly promotable compared to larger apples.

Commodity/Region	Supply	Price	Quality
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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

The pineapple market is stabilizing but remains tight on 8 & 10ct crownless and organic pineapples. Expect substitutions, order changes, and port delays due to the holidays through the end of 2025.

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

Potato supply and demand are strong for the holidays, with sheds open for deals. Smaller counts are tight. Burbank potatoes are available, with Norkoth as the main variety. WA potatoes are high quality, peaking on mid sizes, while large and small counts remain limited. Color potatoes are available, and trucking is influencing the market. New crop sweet potatoes from CA and NC are also available.

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

Zucchini supply is good on both coasts, with promotable volume available. Yellow squash also has strong availability, with options from Florida, Nogales, and McAllen.

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

Pomegranates, persimmons, and pineapple quince are nearly finished for the season, expected to be done by Christmas. Domestic Asian pears remain available, while the domestic kiwi market is steady at higher prices. Imported peaches and nectarines are expected to arrive on both coasts in about two weeks.

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

Roma Tomatoes: Florida transitioning; Mexico lighter but improving, with strong quality. West Mexico volumes expected to increase in January. McAllen product lower priced but fair quality.

Round Tomatoes: South Florida steady, supported by Naples and rising Mexican supply. **Grape Tomatoes:** Steady supplies, good Florida quality, and consistent Mexican shipments.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Steady	\$\$\$	Good
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Florida (November - May)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Weather Updates



CALIFORNIA

Tuesday morning will see cold lows, with upper 20s–low 30s south of Soledad and mid 30s–mid 40s elsewhere. Lows will warm to upper 30s–mid 50s for the rest of the week, with daytime highs in the mid 50s–mid 60s.



MEXICO

Frost is possible in wind-sheltered areas Wednesday into Thursday. Lows will be in the low–upper 40s Tuesday, mid 30s–mid 40s Wednesday and Thursday, and low–upper 40s Friday and Saturday. Highs will range from upper 50s–upper 60s Monday, mid 60s–mid 70s Wednesday–Thursday, and low–upper 70s Friday–Saturday, with mostly dry conditions through the weekend.



FLORIDA

Northern and North Central Florida will see cold mornings with patchy frost through Wednesday, possibly into Thursday. Frost risk decreases Friday and Saturday as mornings moderate. Dry, cool weather will shift to warmer temperatures with possible weekend showers. Winds will gust near 20 mph Tuesday and around 15 mph Wednesday–Thursday across Southeast Florida and the Tampa Bay area.



ARIZONA

Northerly winds of 15–20 mph will continue down the Colorado River Valley Tuesday, easing Wednesday. A low-pressure system west of Baja will bring scattered light showers to the low deserts Wednesday afternoon through early Friday, with dry conditions returning Friday afternoon except in central Arizona. Highs will be upper 60s–70s Tuesday–Wednesday, cooling to 60s–low 70s Thursday–Friday. Morning lows will rise to mid 40s–mid 50s Tuesday and remain near there into the weekend.

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



Freight Updates

Freight this week, the last of 2025 comes with no shortage of excitement. Elevated markets and demand for truck capacity gives us at Pro*Fresh the opportunity to fully exercise every facet of our supply chain solutions all in the name of freshness. Although the challenge of freight is substantial this time of year – We have you covered!



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

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

	12/15/25	12/22/25	12/29/25	Change from	
				week ago	year ago
U.S.	3.607	3.544	3.500	↓ -0.044	↓ -0.003
East Coast (PADD1)	3.703	3.674	3.645	↓ -0.029	↑ 0.058
New England (PADD1A)	4.064	4.047	4.035	↓ -0.012	↑ 0.282
Central Atlantic (PADD1B)	3.944	3.892	3.875	↓ -0.017	↑ 0.101
Lower Atlantic (PADD1C)	3.580	3.557	3.522	↓ -0.035	↑ 0.021
Midwest (PADD2)	3.567	3.483	3.424	↓ -0.059	↓ -0.045
Gulf Coast (PADD3)	3.267	3.214	3.184	↓ -0.030	↓ -0.012
Rocky Mountain (PADD4)	3.385	3.304	3.233	↓ -0.071	↓ -0.137
West Coast (PADD5)	4.294	4.205	4.156	↓ -0.049	↑ 0.046
West Coast less California	3.871	3.766	3.719	↓ -0.047	↑ 0.014
California	4.781	4.711	4.660	↓ -0.051	↑ 0.084

*prices include all taxes

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



Crop Updates

January Starts Quiet, but a Few Items Still Feel the Pinch

The holidays are behind us, demand has cooled off, and for the most part the market has taken a breath. That said, a few items are still working through some real challenges as we settle into January. Celery, green onions, and asparagus continue to feel the effects of recent weather, lighter holiday labor, and normal seasonal transitions.

Celery remains the most stressed of the three. Oxnard took a hit from heavy rain and strong winds, which knocked over mature fields and slowed harvests. Some younger acreage also dealt with flooding, and growers are still sorting through what that means longer term. Santa Maria continues to produce, desert harvests are ramping up, and Florida is starting to contribute more volume, but Oxnard will need some time to get back on its feet. Until then, availability is expected to stay snug.

Green onions are facing a similar mix of issues. Holiday labor shortages reduced harvest and packing activity, and intermittent border delays added another layer of friction. Rain in the Mexicali region created muddy conditions and increased the risk of softness and early decay in some lots. Crews are returning and conditions are improving, but supplies may remain uneven over the next couple of weeks.

Asparagus is less about overall volume and more about size. Jumbo and extra-large spears remain limited out of Mexico due to lingering weather effects and aging crowns, leaving most of the supply skewed toward small and standard sizes. New-crop Mexicali fields are expected to start helping soon, with additional relief later this month as the Caborca season comes online. Peru continues to be a steady source, particularly for larger sizes, and is helping balance the market.

None of these situations feel permanent. As fields recover, labor levels normalize, and new acreage comes into production, conditions should gradually improve. In the meantime, a little flexibility on size and a bit of extra lead time will go a long way.



JOEY PIEDIMONTE
SOURCING MANAGER