

The Source

Commodity of the Month - Lemons

MARKET ALERTS

Brussel Sprouts: Remain very limited, with insect pressure, some decay, and mostly smaller sizes in Salinas Valley and Oxnard.

Celery: Light supplies, high value-added prices; Yuma starts post-Christmas; minimal quality issues; small sizes tight.

Grapes: Green grapes done, limited quality; red grapes available but declining; imports starting, volume rising.

Green Onion: Green onions tight; market strong into next week.

Lettuce (iceberg): Supplies improving; Yuma moderate; value-added prices up; minor defects; weights 36–42 lbs.

Lettuce Leaf: Romaine/leaf up; butter very limited; romaine hearts tight; value-added prices up; minor leaf defects.

Pineapple: Pineapples tight (8/10ct crownless & organic); substitutions likely; Mexican production up, minimal US shipments.

Strawberries: Strawberries light but improving; yields rising in Oxnard, CMex, Florida; demand high; weather favorable.

DECEMBER 3, 2025

CROP UPDATES

Yuma harvest faces delays, but quality and weights are improving. Desert lettuce is strong; Brussels sprouts and green onions remain tight. California navels sizing larger; desert lemons leading supply. Early mandarins, grapefruit, and Cara Caras light but improving. Berries slowly recovering; supplies rising mid-December, markets remain elevated. [Read more](#)

WEATHER

California: Freezing mornings continue south of King City, with Wednesday night coldest. Weekend highs 60s–70s, lows 30s–50s.

Mexico: Seasonal temps through Friday, slightly cooler weekend; highs 70s–80s, lows 40s–50s. Dry thru Thu, isolated showers Fri–Sat.

Florida: Dew points above freezing Thu; cooler north FL, rain Fri–Sun (1–2" N/ Panhandle, <0.5" central–south). Winds ≤20 mph thru Dec 6.

Arizona: Morning lows 30s–40s; winds Thu keep Yuma 40s. Highs mid-60s SW AZ, low-mid 70s SE CA; warming into weekend.

IN PEAK SEASON

- Avocados
- Oranges
- Pears
- Potatoes

FREIGHT

Freight this week sees the challenges of transition from Salinas to Yuma drawing to a close. We do anticipate Friday, November 26th to be the peak of Thanksgiving Holiday pressure and recommend extra focus to ensure trucks are loaded and rolling efficiently. Happy Holidays from the Pro*Fresh Logistics team, we are Thankful for the partnerships, new and old.



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Commodity Updates



Apples

Food service sizes remain tight, with pack-outs skewed toward larger apples and limited availability of smaller fruit. Sizes 125s and 138s are available but in short supply, while 113s and 100s are more readily available.

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



Asparagus

Mexican asparagus supplies are steady with soft demand and flat pricing through late December. Strong production in Southern Baja, Sonora, and Central Mexico should maintain consistent volume, while Caborca won't peak until mid-January. Jumbo sizes remain limited. Peruvian production is increasing, boosting volumes and XL/JBO availability, with good quality expected, though warmer weather will require careful grading.

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



Avocados

Markets remain soft due to ample fruit on the trees and decreased demand. Aventajada is currently the primary crop being harvested and shipped, with dry matter and oil content steady in the mid-to-high 20s for both crops.

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



Bell Peppers

California: Light volume and smaller sizes, with the desert deal wrapping up soon.

Georgia: The season is essentially finished. Florida is slow this week but improving, and a new region (Loxahatchee) is beginning.

Mexico: Volume continues to increase through McAllen and Nogales. Markets should remain steady to slightly lower after the holidays, with stronger supplies expected the first week of January, especially on colored bell peppers.

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

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

Supply Partners



Commodity Updates



Berries (Blackberries)

No changes from last week. Fruit supplies remain strong out of Baja and CMEX, with steady markets and good overall quality. An occasional red cell is still being observed in some packs.

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

Peruvian supplies remain available, and volumes from Central Mexico continue to increase. Production is also moving through McAllen, Texas. Quality from both regions has been very good, and this trend is expected to continue into late 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)	Steady	\$\$\$	Excellent
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Berries (Raspberries)

Production out of Central Mexico remains steady, with no significant changes in the market.

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

Strawberry supplies remain light across all districts, but conditions are expected to improve toward the end of the week as volumes increase from Oxnard, Central Mexico, and Florida. Yields are steadily rising in all three growing regions. While demand remains high, order fulfillment is expected to get easier. Favorable weather over the next two weeks should help sustain this positive trend.

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

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Commodity Updates



Broccoli

Broccoli supplies are slightly limited heading toward the end of the Salinas season, compounded by recent rains. The market is expected to remain steady 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 limited. Salinas Valley and Oxnard regions are facing insect pressure, some decay, and a prevalence of smaller-sized sprouts.

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



Carrots

Harvest is now underway in the Bakersfield region. Jumbo sizes remain tight due to smaller fruit, as shippers started earlier than expected because of inclement weather. Snack pack orders should be placed 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

Cauliflower supplies are improving across all sizes and regions, with the market expected to gradually ease into next week.

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



Celery

ALERT

Light supplies for this commodity remain an industry-wide challenge. Elevated pricing on value-added products is currently in effect. Production in Yuma is not expected to begin until after Christmas. Quality concerns are minimal, with only slight seeder reported. Smaller sizes are the most limited in availability.

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 48-count, 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)

District 1 (San Joaquin) is starting light, with fruit still coloring and limited volume. District 3 (CA Desert/AZ) remains the main region, though volumes will decline, and 140-count and smaller sizes are very limited. Mexican fruit is also available for South Texas loading.

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 lime market is tightening with lower volumes, and active markets are expected through early 2026 due to holiday demand. Large sizes are peaking now, while small sizes will peak by mid-December with the new crop. Occasional styler is showing in some lots. Prices are expected to rise for the holidays plan and book early.

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



Citrus (Oranges)

Navels are in full swing as the main variety. Markets are rising on smaller fruit due to limited availability, while peak sizing is shifting toward 72-count. Current gas times are about 2 days, with brix around 12. Colder nights have helped reduce gassing times.

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



Cucumber

Mexico: Good supply this week with steady markets.
Florida: Most growers are now underway; volumes are light this week but production is steady, providing adequate supply and stable markets ahead.

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

Georgia is finished, and Florida (Immokalee) is done. Volume is ramping in South/Central Florida and Mexico (Nogales). Slightly higher markets are expected, with high freight potentially making Florida more attractive for the East Coast.

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

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

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

ALERT

Domestic green grape harvest ended abruptly over the weekend, with very limited volume and questionable quality remaining. Domestic red grapes are still available this week and next, though supplies will decline quickly in December. Imports have started lightly on both coasts, with volume expected to increase significantly in the coming weeks.

Grapes (Green)

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

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

ALERT

Green onion supplies remain very tight due to recent rains reducing yields. The market is expected to stay strong into next week.

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

Kale supplies and quality remain mostly good, with similar conditions expected 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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Salinas, California (May - October)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Lettuce Iceberg

ALERT

Supplies have improved compared to recent weeks, and Yuma production is providing moderate availability. Escalated pricing on value-added products will continue through at least the end of the week. Common defects on arrival include brown butts, discoloration, and misshapen heads. Weights are ranging from 36 to 42 pounds.

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



Lettuce Leaf

ALERT

Production of romaine, as well as green and red leaf, has increased. Butter lettuce remains extremely limited in availability, and this is expected to continue through the week. Romaine hearts will be available but remain tight across the industry. All leaf items will stay on escalation for value-added products for at least the week. Reported quality issues include discoloration along with tip and fringe burn.

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



Lettuce Tender Leaf

Tender leaf items remain on the tighter side due to reduced yields caused by insect pressure and recent hail. Expect supplies to remain tight throughout the 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)

The Westside deal is complete. Offshore and Mexican cantaloupes are available. Offshore cantaloupe pricing is high due to vessel delays and lower yields entering the U.S., keeping markets elevated until supplies improve. Offshore cantaloupes are peaking on 9s with excellent quality and brix levels. Mexican cantaloupes offer better sizing. Supply issues from last week's protests in Mexico have improved this week.

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

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

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Commodity Updates



Melon (Honeydew)

Offshore and Mexican honeydews are available. Offshore pricing is elevated due to vessel delays and lower U.S. yields, keeping markets high until supplies improve. Offshore honeydews are peaking on 5s with excellent quality and brix levels.

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. Prices are steady, with Mexican watermelons from Nogales supplying the Midwest and East Coast. Limited supplies are available from Mexico via Texas and Nogales, impacted by last month's rains. Offshore watermelons are also available 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 are improving following the holiday demand.

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, with strong domestic demand. Prices are expected to rise as demand increases. Weather in Idaho may impact trucking, and all product is in storage. Market conditions for the rest of the year will be driven by weather and transportation. Reefers and rail are preferred; flatbeds are not recommended due to weather.

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, with good production of Anjou, Bartlett, Bosc, and Red pears. Foodservice sizes are readily available across all varieties.

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 settling but remains tight on 8- and 10-count crownless and organic pineapples. Expect substitutions, cancellations, and order changes for these items. Mexican production is increasing, though minimal fruit is currently being shipped to the U.S.

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



Potatoes

Harvest is complete, and storage crop supplies are steady post-holiday, though smaller counts remain tight. Burbanks are emerging, with Norkoths as the main variety. WA potatoes are high quality, peaking on mid sizes. Trucking is driving the market. New crop sweet potatoes are starting in NC.

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



Squash

Mexico: Zucchini volume remains strong; yellow squash is limited with wide price gaps.

Florida production is increasing over the next 7-14 days.

Markets are expected to ease post-Thanksgiving as demand softens and supplies improve.

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



Stone Fruit

Imported peaches and nectarines are expected on both coasts by mid-December. Pomegranates and persimmons are winding down, while Asian pears remain in decent supply through December. Domestic kiwi markets should stay steady at higher price levels.

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



Tomatoes

Markets are steady to slightly lower post-Thanksgiving.

Romaine: Florida very tight; Mexico short; quality fair-good.

Grapes: East ample; Mexico lighter.

Rounds: East steady; West light to moderate.

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

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

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Weather Updates



CALIFORNIA

Freezing mornings persist south of King City, with the coldest temperatures of the season expected Wednesday night. A low passing to the east will deepen the marine layer and keep temperatures cool across the region. Morning lows are forecast to range from the upper 20s to low 30s south of King City, and from the mid 30s to mid 40s closer to the coast. Daytime highs will reach the low to mid 60s. As the low moves out on Thursday, high pressure will build in, bringing a warming trend. Minimum temperatures over the weekend are expected to range from the low 30s to low 50s, with highs in the low 60s to low 70s.



MEXICO

Temperatures will remain seasonal through Friday, followed by slightly cooler conditions over the weekend across the fields of Central Mexico. Highs are expected to range from the low 70s to low 80s through Friday, then settle mostly in the low to upper 70s over the weekend. Low temperatures will hold steady in the mid 40s to mid 50s through Sunday. Dry conditions are expected through Thursday, with isolated showers possible on Friday and Saturday, returning to dry weather on Sunday.



FLORIDA

Dew points should remain above freezing, helping keep ground temperatures above the frost point on Thursday. Cooler conditions will persist across northern Florida, and rain chances will increase statewide heading into the weekend as a series of disturbances moves along a frontal boundary. Rainfall totals of one to two inches are possible in parts of northern Florida and the Florida Panhandle, with a half inch or less expected from north-central to south Florida. Winds are forecast to gust at or below 20 mph through December 6.



ARIZONA

Morning low temperatures will largely depend on surface wind speeds over the next several days, given the otherwise stagnant weather pattern. Dome and Roll briefly dropped into the upper 30s on Tuesday, approaching light lettuce-icing conditions. Both valleys are expected to reach similar temperatures again on Wednesday and Friday, while northerly winds gusting 17–22 mph on Thursday should keep all of Yuma in the 40s. Wenden will continue to see mid-30s through the weekend, warming to the low 40s by Sunday.

High temperatures will cool to the mid- to upper 60s in southwest Arizona from Wednesday through Friday, with southeast California holding in the low to mid 70s. A slight warming trend is anticipated heading into the weekend.

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



Freight Updates

Freight this week sees the challenges of transition from Salinas to Yuma drawing to a close. We do anticipate Friday, November 26th to be the peak of Thanksgiving Holiday pressure and recommend extra focus to ensure trucks are loaded and rolling efficiently. Happy Holidays from the Pro*Fresh Logistics team, we are Thankful for the partnerships, new and old.



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

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

	11/17/25	11/24/25	12/01/25	Change from	
				week ago	year ago
U.S.	3.868	3.831	3.758	↓ -0.073	↑ 0.218
East Coast (PADD1)	3.856	3.862	3.785	↓ -0.077	↑ 0.188
New England (PADD1A)	4.021	4.057	4.049	↓ -0.008	↑ 0.276
Central Atlantic (PADD1B)	3.999	4.010	3.982	↓ -0.028	↑ 0.189
Lower Atlantic (PADD1C)	3.787	3.789	3.687	↓ -0.102	↑ 0.180
Midwest (PADD2)	3.913	3.850	3.755	↓ -0.095	↑ 0.234
Gulf Coast (PADD3)	3.490	3.459	3.415	↓ -0.044	↑ 0.188
Rocky Mountain (PADD4)	3.813	3.723	3.665	↓ -0.058	↑ 0.234
West Coast (PADD5)	4.559	4.514	4.441	↓ -0.073	↑ 0.277
West Coast less California	4.180	4.108	4.026	↓ -0.082	↑ 0.287
California	4.996	4.983	4.919	↓ -0.064	↑ 0.267

*prices include all taxes

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



Crop Updates

Desert Volume Builds, Citrus Sizes Shift, and Berries Slowly Recovering

We're not off to the smooth start we were hopeful for post-Thanksgiving. Load times in Yuma remain long as growers work through muddy fields and backed-up harvest schedules. Crews are doing everything they can to catch up, but customers should still expect delays at the cooler and a slower turn on trucks through early next week. The good news: product quality is improving every day, and weights are trending upward as the fields dry out and temperatures stabilize.

On the lettuce front, desert iceberg, romaine, and green leaf are all showing stronger quality than in recent weeks. There are still some fringe burn and scattered mildew pockets being trimmed out in the field, but overall quality is above average for early December. As production ramps up, we're seeing some markets are easing, and we should see more consistent availability through the remainder of the month. Brussels sprouts and green onions remain the tightest commodities, with supplies expected to improve late December.

The rains across the Central Valley pushed California navel sizing heavier, with the crop now peaking on 88 count. Small fruit is available, but expect larger sizes to dominate as we move deeper into winter and continue into Valencia season next summer. Early navels are eating well and color will continue to improve as nighttime temperatures drop.

District 3, the desert region, Coachella and Imperial Valleys, are rolling with strong lemon volume, and will remain the primary region through February. District 1, the central valley region, has started in a small way and will pick up momentum heading into January.

Meyer lemons and seedless varieties are also available with solid supply. Grapefruit is trickling in from the desert, and California mandarins are beginning their season with peak sizes in the 32/36 range. Cara Caras early blood orange are starting their first full week of production. Supplies are light but improving.

The berry situation is improving, but not as quickly as we would like. California is still struggling to recover and harvest has been minimal in Oxnard. Growers are holding off until fruit colors up and field conditions become workable. Mexico is increasing volume into South Texas, though white shoulders and bruising remain common. Baja has just begun crossing after delays last week. Florida production is climbing steadily, but cooler weather is slowing maturity there as well. Overall, supplies will improve through mid-December, but markets will stay elevated until more volume fills the pipeline from Mexico and Florida.



JOEY PIEDIMONTE
SOURCING MANAGER