

The Source

Commodity of the Month - Dry Veggies

MARKET ALERTS

Brussel Sprouts: Supplies are very limited, with Oxnard facing insect pressure, decay, and smaller sizes.

Carrots: Southern San Joaquin carrot harvests are delayed by rain, keeping supplies tight for 6–8 weeks. Baby carrots/value-added items available. Prices rising; 72-hour lead time recommended.

Citrus (Oranges): California Navels are heavy on 56/72ct; 113/138ct very limited. Flexibility or Cara Cara substitutions needed. 4–5 day lead time recommended; markets higher on small/Choice/Fancy.

Grapes: Imported red and green grapes are more plentiful, and the market is adjusting.

Melon (honeydew): Offshore and Mexican honeydews are available; offshore prices high, Mexican limited during the regional transition.

Pineapple: Pineapple market settling but tight; contracts prioritized. 6–7 crowns up, 8 crowns steady; crownless 8/10 limited. Organic tight. Quality good.

Strawberries: Markets are rising as cold Florida temps and rain in California/Baja lower yields. Central Mexico remains steady, but open-market fruit will stay limited through January.

JANUARY 21, 2026

CROP UPDATES

Valentine's Day demand is ramping up in berries, tightening supplies in key areas. Florida strawberries face cold-weather impacts, slowing harvests and keeping markets firm through late January. California yields are improving, but not enough to offset Florida's shortfall. South Texas and Mexico are filling gaps, though availability remains limited. Baja volumes are expected to help stabilize supply by early February. Blueberries, blackberries, and raspberries are steady to slightly tight. Early planning and flexibility on origin are essential to secure coverage for the holiday. [Read more](#)

WEATHER

California: High pressure brings cool mornings and warm afternoons Wednesday, with lows in the upper 20s–mid 40s and highs in the mid-60s–upper 70s.

Mexico: Seasonal temperatures through the weekend with isolated showers under 0.10".

Florida: Cold front brings showers midweek; cooler, drier, and frost possible Friday–weekend with gusty winds.

Arizona: Northerly winds keep mornings cool midweek; highs 10° above normal, light lettuce icing possible.

FREIGHT

Freight this week sees reprieve from the holidays markets in Yuma, but still some demand for trucks due to FMCSA Non-Domiciled compliance issues. Across the country we are seeing threat of inclement weather along I40 and into the northeast. At this point, we intend to load and ship trucks as usual.

IN PEAK SEASON

- Apples
- Avocados
- Oranges
- Pears
- Potatoes

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Commodity Updates



Apples

Foodservice-size Gala and Granny Smith apples remain in tight supply, with prices edging slightly higher. Other varieties are more readily available, though the market is also trending modestly upward.

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



Asparagus

Demand for asparagus remains weak as growing Mexican supplies on the West Coast continue to pressure older Peruvian product moving through Los Angeles. Warm weather has extended production in Constitución and Hermosillo, both set to finish this week, while early arrivals from Mexicali, San Luis Río Colorado, and Caborca have added unexpected volume. As production ramps up ahead of schedule, open-market pricing has softened, with ST around \$22 and LG near \$26 as of the end of last week.

Commodity/Region	Supply	Price	Quality
Ciudad Obregon (Year Round)	High	\$\$\$	Good
Peru (Year Round)	Steady	\$\$\$	Fair
Mexico (November - May)	Light	\$\$\$	Fair



Avocados

Markets are steady on 40ct and 48ct, while 70ct sees a slight increase as peak sizing grows. Aventajada is currently the primary crop being harvested and shipped, with dry matter and 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

Green bells are firm due to limited Florida supply, while Mexican production remains steady and strong Eastern demand keeps the market active. Colored bells are stable, with good volume, quality, and pricing.

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



Berries (Blackberries)

Steady supplies combined with low demand are keeping this item readily available out of Texas and California.

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



Berries (Blueberries)

Product is shipping from CMEX, Chile, and California. Markets are firm out of California, Texas, Florida, and Philadelphia. The 12/1 pint packs are becoming harder to source, while the 12/6 oz pack remains the primary offering for most shippers.

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



Berries (Raspberries)

Demand remains low as heavier volumes continue to come out of CMEX and Baja.

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



Berries (Strawberries)

ALERT

The market is trending upward as weather impacts reduce supplies in Florida and California. Cold temperatures in Florida, along with recent rain in California and Baja, have significantly lowered yields. Central Mexico remains largely unaffected, with steady supplies continuing to cross into the U.S. Open-market fruit is expected to remain limited through January.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Fair
McAllen (November - May)	Steady	\$\$\$	Good
Dover, Florida (Year Round)	Light	\$\$\$	Good

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

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Only the Finest Berries™



Commodity Updates



Broccoli

Broccoli supplies have tightened this week, driving the market higher. Prices are expected to continue edging up into the weekend, as planting gaps from late November and early December rain events limit available volume.

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



Brussel Sprouts

ALERT

Brussels sprout supplies remain extremely limited. Oxnard region production is facing 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

ALERT

Southern San Joaquin carrot harvests have been heavily impacted by recent weather, with last weekend's rain further saturating fields and delaying harvest. Standing water and ongoing wet conditions are limiting yields, and supplies are expected to remain tight for the next 6-8 weeks, with relief not expected until the Imperial Valley harvest begins in mid to late February. Baby carrots and value-added items are available but closely monitored. Commodity pricing is rising, and a minimum 72-hour lead time is recommended—early ordering and flexibility are essential.

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 began tightening late last week. The market is expected to rise slightly as harvests slow due to November and December rains.

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



Celery

Availability is stronger in Southern California and Yuma, while demand remains active and pricing stays strong for this time of year. Oxnard/Santa Maria continues to offer the best pricing, so take note. Second-tier price increases are ongoing this week for all value-added items. Quality has been reported as good.

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 primary growing region, with peak sizes at 140ct, 115ct, and 165ct. Mexican supplies are also available—contact us if you need fruit for South Texas shipments.

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)

Supplies are very tight from Mexico, Colombia, and Peru due to heavy rainfall. Larger sizes (175s and up) are extremely limited, with most volume in 200s and smaller. Quality is fair, with some disease issues, and price and size pressure are expected through March.

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



Citrus (Oranges)



California Navels are heavy on larger sizes (56ct/72ct), with small sizes (113ct/138ct) very limited through the season. Flexibility and substitutions to larger Navels or Cara Caras will be needed. Advance 4–5 day orders are recommended. Expect higher markets on Choice, Fancy, and small fruit; schools and DOD programs should consider 88ct or 72ct.

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



Cucumber

Mexico remains the primary source, with supply meeting current demand. Honduras is shipping limited volumes. Quality is very good, featuring firm, well-colored fruit.

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

Florida supplies are extremely limited due to cold weather, while Western production is meeting demand. Sinaloa volumes remain steady with good quality.

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, supplemented 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

Imported red and green grapes are more abundant on both coasts, and the market is adjusting to the improved availability.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies remain very tight due to recent rains reducing yields. Availability is expected to slowly improve heading into next week.

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



Kale

Kale supplies and quality remain strong, with similar conditions expected into next week.

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

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

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Commodity Updates



Lettuce Iceberg

Demand has increased while supplies are much lighter than in previous weeks. Markets are expected to strengthen daily over the next three weeks across all suppliers. Quality is reported above average, with weights ranging from 38-43 pounds. Southern California is not producing, and Yuma is beginning to experience production gaps with a few shippers.

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, as well as green and red leaf, will be readily available over the next few weeks. Promote aggressively, as most other major row crops remain very active. Butter lettuce supplies are improving, with multiple shippers accommodating volume-type orders. Overall quality is above average, with minimal fringe burn or discoloration. Romaine hearts are expected to have steady availability throughout the week.

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

Tender leaf items like spinach and arugula are tight this week due to quality issues and lower yields. Supplies and quality are expected to improve heading 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	\$\$\$	Fair
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Melon (Cantaloupe)

Westside and Nogales deals are complete. Offshore cantaloupes are available in CA, TX, FL, and the Northeast, with pricing stabilizing as demand evens out.

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 honeydew prices are higher due to vessel delays and lower yields entering the U.S., while Mexican honeydews remain limited as the industry transitions from Northern to Southern Mexico.

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



Melon (Watermelon)

Lower yields on new fields have pushed pricing and demand higher for Mexican watermelons. Offshore watermelons are available from Florida. Weather permitting, Nogales supplies should continue through April before transitioning to the domestic season.

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



Mushroom

Supplies and availability are excellent.

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



Onions

Onions are available from WA, ID, and UT, with strong domestic demand. Yellow and red onion prices remain steady, while white onion prices are rising. Transportation costs are influencing the market.

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 is steady with good supplies. Bartletts are tapering off for some shippers, while others continue packing from controlled atmosphere storage.

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

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

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Commodity Updates



Pineapples

ALERT

The pineapple market is starting to settle but remains tight. Contracts continue to take priority. For sizing, 6- and 7-crown counts are up, while 8-crown counts are steady. On crownless fruit, 8- and 10-count remain limited. Organic pineapples are also tight. Overall quality and flavor are good.

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



Potatoes

Potato supply and demand are strong, with sheds actively making deals. Smaller counts are becoming harder to find. Burbanks are now available, with Norkoths as the main variety. Washington potatoes are producing excellent quality, peaking on mid sizes, while large and small counts remain tight. Color potatoes are available, and trucking is impacting the market. New-crop sweet potatoes from CA and NC are also available.

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



Squash

Supplies are very tight from Florida and Mexico, with zucchini especially limited due to cold and bloom drop. Quality is inconsistent, and availability remains the main concern.

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



Stone Fruit

Domestic kiwi supplies are nearly finished. Imported kiwi are arriving on both coasts with a steady market. Imported peaches, plums, and nectarines are available at reasonable prices, and domestic Asian pears remain in supply.

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



Tomatoes

Round Tomatoes: Florida supplies are light, though Naples harvests remain mostly steady. Larger sizes (jumbo/XL) are very good in quality. Mexico volumes are light to moderate, with strong quality.

Roma Tomatoes: Florida production is steady, with larger sizes and good quality. Mexico supplies are moderate, with Baja tapering and Central Mexico light. Sinaloa volumes are expected to increase in 2-3 weeks.

Grape Tomatoes: Florida production is lighter, but Lipman supplies remain steady. Mexico volumes are limited due to weather, though overall quality remains strong.

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

An upper-level low moves in Wednesday, bringing onshore winds that rebuild the marine layer and moderate temperatures. Morning lows will range from the low-mid 30s south of King City to the low-upper 40s elsewhere, with daytime highs in the low-upper 60s.



MEXICO

Central Mexico will see isolated showers Wednesday, followed by dry weather Thursday through Sunday. Temperatures remain steady, with highs in the mid-60s to low-70s through Friday, rising to the upper-60s to mid-70s over the weekend. Lows will stay in the low to upper 40s.



FLORIDA

Northern Florida will experience frost Wednesday morning. Milder temperatures with a few isolated showers are expected Thursday and Friday, followed by isolated to scattered showers over northern and central Florida this weekend. Rainfall totals will range from 0.02–0.20” through Friday, increasing to 0.50” or more over northern Florida this weekend. Winds will gust 17–25 mph through Thursday, easing to around 20 mph or less Friday in southeast Florida and the Tampa Bay area.



ARIZONA

From Wednesday into the weekend, morning lows will gradually warm while afternoon highs cool, as increasing humidity and cloud cover develop from an upper-level cut-off low moving toward northern Baja.

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

Freight Updates



Freight this week sees reprieve from the holidays markets in Yuma, but still some demand for trucks due to FMCSA Non-Domiciled compliance issues. Across the country we are seeing threat of inclement weather along I40 and into the northeast. At this point, we intend to load and ship trucks as usual.



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

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

	01/05/26	01/12/26	01/19/26	Change from	
				week ago	year ago
U.S.	3.477	3.459	3.530	↑ 0.071	↓ -0.185
East Coast (PADD1)	3.630	3.613	3.653	↑ 0.040	↓ -0.167
New England (PADD1A)	4.024	4.010	4.007	↓ -0.003	↑ 0.063
Central Atlantic (PADD1B)	3.872	3.858	3.843	↓ -0.015	↓ -0.133
Lower Atlantic (PADD1C)	3.502	3.484	3.548	↑ 0.064	↓ -0.202
Midwest (PADD2)	3.387	3.365	3.445	↑ 0.080	↓ -0.203
Gulf Coast (PADD3)	3.172	3.160	3.248	↑ 0.088	↓ -0.207
Rocky Mountain (PADD4)	3.222	3.185	3.246	↑ 0.061	↓ -0.239
West Coast (PADD5)	4.128	4.110	4.189	↑ 0.079	↓ -0.113
West Coast less California	3.683	3.674	3.782	↑ 0.108	↓ -0.083
California	4.641	4.613	4.658	↑ 0.045	↓ -0.149

*prices include all taxes

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

Crop Updates



Valentine's Day Demand Is Building in the Berry Category

With Valentine's Day approaching, berry demand is starting to build across both retail and foodservice, and supply is tightening in a few key areas. This is shaping up to be a year where early planning will make a real difference.

Florida strawberries are currently the main challenge. Overnight temperatures have dipped into the mid-30s in several growing regions, forcing growers to protect fields with irrigation. Harvests were canceled earlier this week, and production will be slow to recover. As a result, demand is expected to exceed supply for the next 7 to 10 days, keeping markets firm through the end of January.

Out West, Oxnard and Santa Maria are both seeing gradual improvements, with yields increasing day by day. Quality has been good overall, though some lots are showing light softness or green shoulders. Sizes are running medium to medium-large, which fits well with Valentine's promotions. Even so, California alone cannot fully offset reduced volumes from Florida.

Crossings into South Texas remain lighter than normal but are slowly increasing. Quality continues to improve as the season progresses, though sizing is still on the smaller side. Mexico is helping fill gaps left by Florida and California, but availability remains tight enough that open market fruit will be limited as we move closer to the holiday.

Baja is nearing the point where more meaningful volumes will begin crossing, which should help stabilize supply into early February. Florida is also expected to rebound as temperatures moderate, setting up a stronger production window after the holiday.

Outside of strawberries, blueberries are settling into a more balanced position as Chilean fruit replaces Peru, with Central Mexico volumes slowly increasing.

Blackberries remain steady out of Mexico and Baja with moderate demand, while raspberries are somewhat tighter due to cooler temperatures limiting production.

The message heading into Valentine's Day is straightforward. Demand is coming on quickly, and supplies are improving, but nothing is loose. Prebooking early and staying flexible on origin will be key to maintaining coverage during one of the strongest berry pulls of the year.



JOEY PIEDIMONTE
SOURCING MANAGER