

The Source

Commodity of the Month - Grapes

MARKET ALERTS

Cauliflower: The cauliflower market is rising due to a slight gap in fields and is expected to continue trending upward into the weekend.

Lettuce (iceberg): The market is slightly stronger with above-average quality. Minor defects are minimal, and weights average 39-44 pounds. Production is available from both north and south throughout the week.

IN PEAK SEASON



MAY 21, 2025

CROP UPDATES

California's cherry crop is down to 4.6 million cartons due to bloom damage, while Washington's crop is strong at 21-22 million cartons with good quality expected. Melon production is ramping up in the Southwest as offshore and Mexican supplies decline, with stable volumes expected by June. [Read more](#)

WEATHER

California: The heat wave peaks Wednesday with gusts up to 40 mph. Coastal highs range from mid 60s to low 70s, inland up to 100. A low on Friday cools coastal valleys to the 70s; fields south of King City stay in the mid 80s. Temps warm again by the weekend.

Mexico: Scattered showers and storms continue through Thursday, then become more isolated into the weekend. Highs drop from mid 80s-90s on Wednesday to upper 70s-80s after. Lows range from low 60s to mid 60s over Central Mexico.

Florida: Warm temps persist in Florida through May 25, with highs in the upper 80s to mid 90s and lows in the mid 60s to mid 70s. Isolated showers midweek, mainly in southern areas. Gusty winds continue through Friday.

Arizona: Highs reach 100-110° in AZ and SE California Wednesday-Thursday. Slight cooling starts Friday, but temps stay above normal. Lows mostly in the 60s, with some low 70s.

FREIGHT

Freight is adjusting this week as we move past the DOT Blitz and approach the Memorial Day holiday. Expect changes in loading patterns due to Monday closures and the need to accommodate the holiday schedule.

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Commodity Updates



Apples

No surprises here—prices are steady, and the market's as unchanged as a vintage fruitcake. Foodservice sizes are plentiful, especially if you like your apples tennis-ball-sized. But Honeycrisp and Cosmic Crisp fans, brace yourselves: small sizes are scarce, and some shippers are calling it quits for the season.

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



Asparagus

Domestic supplies are strong in both Washington and Michigan, with steady volume also coming in from Mexico and Peru. Expect the market to hold steady this week.

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



Avocados

Markets are starting to settle as offshore volumes increase on both coasts. Supplies of 48ct and smaller fruit are improving, while larger sizes remain tight. The Normal crop has about 5–6 weeks left before Flora Loca takes over. Meanwhile, California's season is in full swing.

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



Bell Peppers

Green Bells: Harvests are strong in California's Imperial Valley and starting in Georgia, with ample supply and low prices out of Nogales as Mexico winds down.

Red Bells: Mexican supply is tightening with quality concerns, and limited upcoming harvests in California are expected to push prices higher over the next two weeks.

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

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

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Commodity Updates



Berries (Blackberries)

Prices are trending slightly higher while supplies remain steady. California production is expected to start in late June.

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

Georgia is seeing strong supplies, while Central California is producing moderate volumes.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Steady	\$\$\$	Good
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Dover, Florida (Year Round)	Light	\$\$\$	Good
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McAllen, TX (October - May)	Light	\$\$\$	Good
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Berries (Raspberries)

Supplies from Mexico are increasing, leading to softer markets.

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

Berry production in Salinas/Watsonville and Santa Maria remains steady, while decreased demand has led to softer markets.

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

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Driscoll's
Only the Finest Berries™



Commodity Updates



Broccoli

Broccoli quality remains strong, with excellent color and sizing in the fields. The market is expected to stay steady into next week.

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



Brussel Sprouts

Brussels sprout supplies are improving, and the market is expected to trend lower heading into next week.

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



Carrots

Harvest in the Imperial Valley is strong and will continue through this month before moving to the Bakersfield area. Lake Park, GA is shipping volumes of chunks, cellos, jumbos, and babies, expected to last through the month. Please submit snack pack orders 48 hours in advance.

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



Cauliflower

ALERT

The cauliflower market is slowly climbing as fields hit a slight gap. Expect prices to continue rising heading into the weekend.

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



Celery

The market remains steady with all sizes readily available and pricing highly competitive. Quality is strong, with minimal seeder reported. Suppliers are still adding a delivery charge for loads outside Santa Maria/Oxnard, making direct loading in those areas the best option for optimal pricing.

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

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

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Commodity Updates



Citrus (Grapefruit)

Star Rubies are available, peaking at 40ct and larger sizes, and are being shipped from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

Markets remain strong, with 140ct and smaller sizes in tight supply. Shippers are monitoring numbers, and small fruit is expected to stay limited until District 2 ramps up in June. District 1 (San Joaquin Valley) is the main growing region, with minimal support from District 2 (Ventura County/Oxnard).

Commodity/Region	Supply	Price	Quality
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CA Desert/Yuma (October - February)	Steady	\$\$\$	Good
Oxnard/Ventura (February - September)	High	\$\$\$	Good
San Joaquin Valley (October - May)	Light	\$\$\$	Good



Citrus (Limes)

The market remains firm, especially on larger sizes. Fruit is peaking on smaller sizes like 23/250 and even 275ct. Offshore fruit is available but also tight due to strong demand. The lack of rain in growing regions has resulted in more smaller sizes.

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

The Navel season is winding down and will end in June, with small fruit remaining limited. Suppliers are monitoring field projections to manage contracts and avoid early transition to Valencia. The Valencia season is set to ramp up in early June.

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

Georgia volumes are currently light but expected to increase, with good quality reported. Nogales supply is moderate, while Baja and Central Mexico are gaining momentum, offering strong overall supply.

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

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

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Sunkist

FRESH LINK

Commodity Updates



Eggplant

The market remains stable at elevated levels. Mexican prices are lower, while domestic eggplant is commanding higher prices. Overall supply is adequate as Georgia's supply improves.

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



Garlic

Garlic quality remains strong, with solid supplies expected in the coming weeks. Mexican peeled garlic has started this week.

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 remains mostly steady at higher prices. As Chile winds down, Mexico is ramping up quickly. Expect prices to ease slightly next week. Quality has been very good so far.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies and quality remain strong, with the market expected to stay steady into next week.

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



Kale

Kale supplies and quality are strong this week, and this trend is expected to continue 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

ALERT

The market is slightly stronger due to pricing gaps, with overall quality remaining above average. Minor defects like pinking on ribs, outer leaf discoloration, and misshapen heads are minimal. Weights average 39-44 pounds industry-wide, with production available from both north and south throughout the week.

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

Green and red leaf, as well as romaine, will be readily available this week. Shippers have ample supplies and are flexible with larger orders. Steady production of romaine hearts will continue, with minimal fringe and tip burn reported. Expect good quality 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

All tender leaf lettuce is in good supply with excellent quality. Fields are showing consistent sizing, texture, and color. Expect supplies and quality to remain strong through the weekend.

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 cantaloupe market is strong, driven by recent retail ads. Domestic season is here with great quality and favorable Brix levels, along with good sizing and availability. Mexican cantaloupes from Nogales are winding down, peaking on larger sizes in both regions. The offshore season is also ending.

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 honeydew market is strong, fueled by recent retail ads. Mexican honeydews from Nogales are available with better sizing and availability, while the domestic melon season has started slowly.

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 now available from Florida, with California supplies starting in June. Mexican watermelons are increasing in time for the Mother's Day pull. Suppliers expect strong demand for the upcoming holidays, and volume deals are available.

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

Promotional pricing available throughout the summer!

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

Storage onion production from the PNW is nearly complete, and the Texas crop is winding down, with Mexican crossings continuing through July. Contracts are active from the CA desert, moving to central CA by the second week of June. LTL and FTL delivery options are available. GA onions are available in all three colors, though quality and sizing may be affected by recent rain in the region.

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 domestic pear market is stable to slightly lower, meaning not much is happening, but we're calling it something anyway. Supply remains limited, like decent Wi-Fi in the produce aisle. Experts predict the market will stay uneventful until mid-July when California's new Bartlett crop arrives to gently shake things up. Until then, patience, optimism, and maybe some apples are recommended.

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

Supply Partners



Commodity Updates



Pineapples

Pineapple supplies are tight, and substitutions may be needed for the rest of the week. However, improvements are expected in the coming weeks.

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



Potatoes

The market is steady with stable pricing. Distributors prefer DLVD, and deals are available as storage crops end and new crops begin, with planting underway in Eastern Idaho. CA color potato interest is rising, and yellow potato demand is increasing. Color potatoes are available from CA, ID, ND, WI, and FL, with sweet potatoes from NC, Arkansas, and California.

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



Squash

The market is generally weak, with Nogales winding down quickly. Production in Santa Maria and Selma is increasing, and Georgia is offering strong volume and quality. Promotable volume is available.

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



Stone Fruit

The domestic stone fruit season has begun. Peaches are increasing in volume daily, and nectarines are gaining momentum. Apricots and cherries remain in limited supply, keeping prices high. Plums are expected to start shipping in the first week of June.

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



Tomatoes

Tomato markets are active due to tightening supplies and regional transitions. Round tomatoes are facing reduced acreage in Mexico and staggered U.S. harvests, with an active market expected over the next two weeks. Roma, grape, and cherry tomatoes have stable quality and sufficient supply.

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

The heat wave peaks on Wednesday, with afternoon wind gusts reaching up to 40 mph. Morning lows will range from the low 40s to low 50s, with daytime highs ranging from the mid 60s to low 70s along the coast, and upper 70s to 100 inland. A low pressure system passing to the north on Friday will deepen the marine layer, rapidly cooling coastal valley temps to the 70s, while fields south of King City and Lockwood stay in the mid 80s. Temps will warm again over the weekend.



MEXICO

Isolated to scattered showers and thunderstorms are expected through Thursday, with more isolated activity from Friday to Sunday. Highs will reach the mid 80s to mid 90s on Wednesday, then drop to the upper 70s to upper 80s from Thursday through Sunday. Morning lows will be in the low 60s to near 70 on Wednesday, and in the upper 50s to mid 60s from Thursday to Sunday across the fields of Central Mexico.



FLORIDA

Warm temperatures will persist over the Florida peninsula through May 25th, with highs in the upper 80s to mid 90s throughout the weekend. Lows will range from the upper 60s to mid 70s on Wednesday morning, and mid 60s to mid 70s from Thursday to Saturday.

Isolated showers are expected Wednesday and Thursday as a cold front moves through, with northern Florida seeing diminishing chances, while southern Florida may experience a few isolated showers later in the week. Winds will gust at 20 to 25 mph over Tampa and 15 to 20 mph across most of southeast Florida through Friday.



ARIZONA

High temperatures will peak in the 100-105 range over southwest and central Arizona, and 105-110 in southeast California on Wednesday and Thursday, driven by a strong high-pressure ridge. Slight cooling is expected starting Friday into the weekend, but temps will remain above normal overall. Morning lows will be in the 60s across most fields, with some isolated areas in the low 70s.

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

Freight Updates



Freight is adjusting this week as we move past the DOT Blitz and approach the Memorial Day holiday. Expect changes in loading patterns due to Monday closures and the need to accommodate the holiday schedule.



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

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

	05/05/25	05/12/25	05/19/25	Change from	
				week ago	year ago
U.S.	3.497	3.476	3.536	↑ 0.060	↓ -0.253
East Coast (PADD1)	3.567	3.534	3.580	↑ 0.046	↓ -0.315
New England (PADD1A)	3.895	3.877	3.897	↑ 0.020	↓ -0.277
Central Atlantic (PADD1B)	3.796	3.777	3.788	↑ 0.011	↓ -0.326
Lower Atlantic (PADD1C)	3.448	3.408	3.469	↑ 0.061	↓ -0.316
Midwest (PADD2)	3.432	3.416	3.481	↑ 0.065	↓ -0.204
Gulf Coast (PADD3)	3.174	3.143	3.201	↑ 0.058	↓ -0.289
Rocky Mountain (PADD4)	3.460	3.463	3.512	↑ 0.049	↓ -0.234
West Coast (PADD5)	4.204	4.211	4.296	↑ 0.085	↓ -0.199
West Coast less California	3.750	3.735	3.828	↑ 0.093	↓ -0.184
California	4.728	4.760	4.835	↑ 0.075	↓ -0.214

*prices include all taxes

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

Crop Updates



The California cherry crop estimate has been lowered to approximately 4.6 million cartons, down from the 7-8 million projections to begin the season. Rain during the bloom has caused extensive damage to the fruit lowering yields. The lighter crop will support demand until the Washington cherry crop begins in early June.



The Washington crop estimate came in at approximately 21-22 million cartons up 2 million from last year's harvest. Growers report an even bloom and excellent growing conditions across the various growing regions. This will translate into good supplies and quality with production into early August. With lighter production in California there looks to be little overlap in supplies as Washington begins volume production around mid-June.



Domestic melon production has begun in the Southwestern desert regions as the offshore season comes to an end with questionable quality. Mexican supplies are light as production transitions to the north. Domestic production will increase weekly as the weather warms with stable volumes expected by June. Sizing is primarily 9s and 12s with no jumbos on this early fruit with brix reported in 12-13% range. Production from the main "Westside" growing region of the San Joaquin Valley is slated to begin in early July.



TIM LYNCH

QUALITY ASSURANCE MANAGER