

The Source

Commodity of the Month - Romaine

MARKET ALERTS

Asparagus: Peru delays create oversupply, pushing down small/standard sizes. Northern harvests rise; Mexico/Baja heavy on smalls. Supplies tighten ahead of January Caborca start.

Brussel Sprouts: Brussels sprouts remain very limited; Salinas and Oxnard face pests, decay, and small sizing.

Cauliflower: Supplies limited but gradually improving.

Cantaloupe: Westside deal ends; offshore fruit starts. Domestic cantaloupes pricey and small due to rain, with sizing and cosmetic issues.

Grapes: Grape market strengthening; greens tightening faster than reds. Peruvian imports increasing late Nov-early Dec.

Lettuce (iceberg): Value-added lettuce remains high-priced amid limited supply and quality issues; production mainly in Huron, Yuma, and Salinas.

Lettuce Leaf: Lettuce supplies remain light, especially romaine hearts, with high prices and quality issues; production in Huron, Salinas, and Yuma.

Lettuce Tender Leaf: Supplies tight from insects and hail, limited through transition.

Strawberries: Short supply continues with steady demand. West Coast storm Thu-Sat may disrupt harvests; cleanup could last into next week. Central Mexico ramping up; Florida delayed, volume expected post-Thanksgiving.

Pineapple: Costa Rica storms limit pineapples through year-end; crownless in high demand. Prices rising, with possible substitutions and port delays.

NOVEMBER 12, 2025

CROP UPDATES

Desert fields ramp up as West Coast storms slow packing. Early romaine/iceberg light but promising; spring mix, arugula tight. Strawberries at risk, melons finishing, offshore arrivals soon. Florida starting, Georgia winding down; supply improving but weather limits volume. [Read more](#)

WEATHER

California: Rain 1-2" south Wed-Sat, lows mid-40s-mid-50s, highs mid-50s-mid-70s. Temps dip Friday night, warm weekend. Showers possible Sunday-early next week.

Mexico: Patchy frost possible in higher elevations through Friday; temps moderate this weekend. Lows mid-30s-mid-50s, highs low-70s-low-80s. Mostly dry.

Florida: One more morning of icing today, then warming and dry through Saturday; isolated showers possible Sunday in northern Florida. Highs mid-60s Wednesday, mid-70s Thu-Sun; lows upper 20s-low 50s. Winds ≤15 mph.

Arizona: Dry and warm today (lows mid-50s-low-60s, highs 80s). Rain 1-1.5" possible late Thu-Sun in southern CA and AZ. Highs drop to upper 60s-low 70s, lows upper 40s-low 50s by Saturday.

FREIGHT

Salinas season ends this week; Yuma starts 11/17. Expect 48-hour dwell times and loading delays as northern product fills the pipeline. Truck market will be active this winter; updates and solutions forthcoming.

IN PEAK SEASON

- Avocado
- Orange
- Potatoes



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Commodity Updates



Apples

The apple market in November appears to be following the same trend we saw in October. Packouts continue to show a predominance of larger fruit, with smaller apples remaining in limited supply. Sizes 125s and 138s are still available, though supplies are tight, while 113s and 100s remain more plentiful.

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



Asparagus

ALERT

Peru's vessel delays have caused oversupply and price pressure as shippers discount small and standard sizes. Southern fields are closing while northern harvests ramp up, boosting volume through December. Mexico and Baja remain heavy on small sizes, but overall supplies should tighten heading into January's Caborca start.

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



Avocados

Markets remain soft, with ample fruit still on the trees and slower demand. The Flora Loca and Aventajada crops are currently being harvested and shipped, both showing similar dry matter and oil content levels in the mid to high 20s.

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



Bell Peppers

Western supplies are strong, with Coachella beginning green bell harvests as northern regions wind down. Nogales is expected to start in 2-3 weeks. In the East, Georgia remains light while Florida is just getting underway. Colored bells are active as production transitions to southern areas.

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

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

Supply Partners





Commodity Updates



Berries (Blackberries)

Production from Central Mexico and Baja remains steady, with quality continuing to improve. Some volume deals are currently available out of Texas.

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

Peruvian supplies remain steady at both East and West Coast ports, with markets softening. Central Mexico is increasing production through McAllen, Texas, and quality has been strong from both regions. This positive trend is expected to continue into December.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Steady	\$\$\$	Excellent
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Dover, Florida (Year Round)	Light	\$\$\$	Excellent
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McAllen, Texas (Year Round)	Light	\$\$\$	Excellent
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Berries (Raspberries)

Supplies are strong out of Baja and Central Mexico, with steady markets and consistently good quality.

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

The industry remains in short supply this week, with steady demand across all regions. A major storm is expected to impact California and the entire West Coast beginning early Thursday and continuing through Saturday, likely disrupting harvests for several days. Cleanup could extend into mid-next week depending on rainfall totals. Central Mexico's production is still ramping up, while cooler temperatures in Florida have delayed start dates, with meaningful volume not expected until after Thanksgiving.

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

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Driscoll's
Only the Finest Berries™





Commodity Updates



Broccoli

Broccoli supplies have improved this week, and the market is expected to soften slightly heading into the weekend.

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



Brussel Sprouts

ALERT

Brussels sprout supplies remain extremely limited, with Salinas Valley and Oxnard regions 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

Harvest is ongoing in the Cuyama and Lancaster regions and will continue through November. Sizing remains consistent with no expected issues. 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)	Steady	\$\$\$	Good
Various Northwest Regions (July - October)	Steady	\$\$\$	Good



Cauliflower

ALERT

Cauliflower supplies remain limited but are slowly improving, with gradual increases expected 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

The market remains strong in both northern and southern regions, with higher pricing on all value-added products. Larger sizes are the most available across all pack types. Salinas production will continue for about two more weeks before transitioning to southern California, while the Yuma season is expected to start in late December.

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 in supply, with 48ct being the most common size, shipping from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

The market is showing some relief as District 1 (San Joaquin Region) begins very light harvests. Current volumes are limited, as fruit is still coloring and requires a few days of gassing, similar to navels. Cooler nights in the coming weeks should help increase volume. District 3 (CA Desert/AZ) remains the primary growing region, though its volume is expected to decline over the next few weeks. 140ct and smaller sizes remain extremely limited. Mexico is also active, so for South Texas shipments, please reach out as 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)

Supplies are abundant with low prices, peaking on 110/150s, while smaller fruit remains tighter. The market is expected to stay stable through mid-November, after which production should decline. New crop is set to begin in January. Offshore fruit from Colombia and Honduras is available for East Coast shipments.

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



Citrus (Oranges)

Navels are in full swing and remain the dominant variety. Markets are soft on smaller fruit, though rain this week and increasing retail activity may stabilize or slightly lift prices. Current peak sizes are 113ct, 88ct, and 138ct, with peak sizing expected to shift toward 72ct as the season progresses, tightening smaller sizes closer to December and January. Gas times are around 2 days, with brix levels at 11-12. Cooler nighttime temperatures have helped reduce gassing times.

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



Cucumber

Mexico: Baja production is slowing with cooler weather, while Western Mexico ramps up, supporting a stronger market with good promotable supplies ahead. **Georgia:** Quality remains excellent; yields may improve midweek before cooler weather returns. Markets tighten but are balanced by increasing volume from Florida and Mexico. **Florida:** Season is just starting, with meaningful volume expected in 7-10 days.

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

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

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FRESH LINK



Commodity Updates



Eggplant

Georgia production remains light due to cooler temps, while Florida and Mexico are adding volume. Short-term tightness may continue, but rising supplies should ease the market and support December promotions.

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

ALERT

The grape market is expected to strengthen through the month. Domestic green grapes are tightening faster than reds, with some shippers finished for the season, while others using storage anticipate having greens through late November. Domestic reds are expected to last into early December. Peruvian imports are already arriving on the East Coast, with volume set to increase on both coasts by late November or early December.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies have improved, with the market expected to remain slightly elevated into next week.

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



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

ALERT

Value-added lettuce continues to carry elevated pricing, expected to persist through the week, as demand exceeds supply. Current production is concentrated in Huron, Yuma, and Salinas, with minimal volume from southern California. Suppliers are facing quality and yield challenges, including light weights, rib discoloration, and misshapen heads. Carton weights range from 34 to 39 pounds, depending on the shipper and region.

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

ALERT

Supplies of romaine, green leaf, red leaf, and butter lettuce are expected to remain light this week, with escalated pricing continuing on all value-added items. Romaine hearts are especially tight, falling short of demand. Quality issues on arrival include tip and fringe burn, discoloration, and light weights. Current production is focused in Huron, Salinas, and Yuma.

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

ALERT

Tender leaf supplies remain very tight due to lower yields from insects and recent hail, with limited availability expected through the transition.

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 wraps up this week as suppliers begin bringing in offshore fruit through Florida, with other ports to follow. Domestic cantaloupe prices remain elevated due to lower yields from rain, with markets firm until supplies improve. Fields are still producing mainly 9s, and sizing will remain a challenge for the rest of the domestic season, with some cosmetic issues from the weather.

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)

Honeydews are available from both domestic and Mexican sources. Offshore supplies are light this week but expected to improve. Fields are still producing primarily sizes 4, 5, and 6.

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



Melon (Watermelon)

Domestic watermelons are nearly finished, with remaining supplies staying local due to pressure issues. Prices are steady, with Mexican watermelons from Nogales supplying the Midwest and East Coast. Limited volume is also available via Texas and Nogales, as last month's rain in Mexico affected production.

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



Mushroom

Supplies are tightening ahead of the holidays, while quality remains excellent.

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



Onions

Onions are available from WA, ID, and UT, with strong domestic demand. All product is in storage, and rain in Idaho may impact trucking. Weather and transportation will drive the market through year-end, with reefer and rail preferred; flatbeds are not recommended.

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



Pears

The pear market remains steady, with strong production of Anjou, Bartlett, Bosc, and Red pears. Foodservice sizes are readily available across all varieties.

Commodity/Region	Supply	Price	Quality
Hood River, Oregon (August-July)	Light	\$\$\$	Good
Yakima, Washington (August-July)	Light	\$\$\$	Good

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

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Commodity Updates



Pineapples

ALERT

Thunderstorms are affecting Costa Rica's growing regions through the end of October into early November 2025, leading to very limited pineapple supplies for the remainder of the year. Crownless pineapples remain in high demand. Expect substitutions, cancellations, and order changes. Pineapple prices will rise starting this week due to the holiday, with port delays potentially impacting loading schedules.

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



Potatoes

Harvest is complete, with good supply and steady demand heading into the holiday pull. Norkoths are the main variety, Burbanks are slowly coming available, and mid-size WA potatoes are peaking. Cooler space is busy, with potential loading delays. Trucking drives the market, and 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 is rising, easing prices, while yellow squash remains tight with higher prices expected mid-month.

Georgia: Production is slowing as the season winds down, though quality remains strong; warmer temps this week may give a slight boost.

Florida: Central region is ramping up, with broader volume expected in 1-2 weeks, helping balance overall supply.

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



Stone Fruit

Imported peaches and nectarines are expected to arrive on both coasts around mid-December. Pomegranates, persimmons, and Asian pears will be in good supply through November and December. Domestic kiwi remains steady, though at higher prices.

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



Tomatoes

Moderate supply and soft demand are keeping prices steady to slightly lower. Baja supplies are adequate, with steady volume from Jalisco crossing through Nogales and McAllen on all varieties. Eastern Florida production is increasing, and Nogales supplies are expected to start in January.

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

A low-pressure system moves in late Wednesday, bringing light to moderate showers mainly south of the region through Saturday, with totals around 1–2". Morning lows will range from the mid-40s to mid-50s, and daytime highs from the mid-50s to mid-70s. Friday night, skies clear slightly, allowing temps south of King City to drop to the low-mid 30s before warming through the weekend. Another system arrives Sunday, bringing additional shower chances into early next week.



MEXICO

Cooler temps with patchy frost are possible in higher elevations and wind-sheltered areas through Friday morning, though most areas should stay frost-free. Temperatures will moderate over the weekend, ending the frost risk. Lows will be mid-30s to mid-40s through Friday and low-40s to low-50s over the weekend, with highs in the low-70s to low-80s. Little to no rain is expected, aside from an isolated sprinkle or two.



FLORIDA

One more morning of icing is expected today, then warming temperatures should reduce the risk. Daytime highs will rise about 10°F by the weekend across most areas. Dry conditions are expected through Saturday, with isolated showers possible Sunday in northern Florida.

Northern Florida highs will be mid–upper 60s Wednesday, then mid–upper 70s Thursday through Sunday. Lows will be upper 20s to low 30s Wednesday morning, low–mid 40s Thursday–Friday, and mid 40s to low 50s over the weekend. Winds will gust around or below 15 mph through Friday.



ARIZONA

Today will be dry and warm, with morning lows in the mid-50s to low-60s and highs in the 80s. Latest models show a slower, wetter scenario with the approaching cut-off low. The system may stall over southern CA, delaying southeast CA rain until late Thursday evening, while central and southwest Arizona could see showers starting early Saturday. The low's center may not reach the state line until early Sunday, with showers tapering off by Sunday afternoon. Total rainfall is expected around 1–1.5".

Highs will cool to the upper 60s–low 70s Friday through the weekend, with lows dropping to the upper 40s–low 50s by Saturday.

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



Freight Updates

Salinas season draws to a close this week with Yuma slated for 11/17 start. Expect Value Added suppliers to continue to fill the pipeline with product from the northern growing regions creating loading delays in Yuma. We are anticipating 48 hour dwell times in Yuma week of 11/17. Be prepared to wait for your product in Yuma. We are also expecting a very active truck market in Yuma this winter and are working on some creative ideas to circumvent the political setbacks affecting the truck market. Stay tuned for that or reach out to our team for more info for the time being.



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

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

	10/27/25	11/03/25	11/10/25	Change from	
				week ago	year ago
U.S.	3.718	3.753	3.837	↑ 0.084	↑ 0.316
East Coast (PADD1)	3.723	3.754	3.823	↑ 0.069	↑ 0.244
New England (PADD1A)	3.933	3.936	3.955	↑ 0.019	↑ 0.208
Central Atlantic (PADD1B)	3.881	3.908	3.956	↑ 0.048	↑ 0.149
Lower Atlantic (PADD1C)	3.642	3.678	3.761	↑ 0.083	↑ 0.283
Midwest (PADD2)	3.715	3.773	3.891	↑ 0.118	↑ 0.387
Gulf Coast (PADD3)	3.350	3.374	3.436	↑ 0.062	↑ 0.266
Rocky Mountain (PADD4)	3.686	3.676	3.803	↑ 0.127	↑ 0.278
West Coast (PADD5)	4.485	4.499	4.545	↑ 0.046	↑ 0.365
West Coast less California	4.095	4.121	4.161	↑ 0.040	↑ 0.404
California	4.934	4.933	4.988	↑ 0.055	↑ 0.322

*prices include all taxes

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



Crop Updates

Holding the Line Through Transition

We've been talking about transition for weeks now, but it's becoming very real this week as the first desert fields start coming online just as the West Coast gets hit with its first true winter storm. Salinas, Santa Maria, and the San Joaquin Valley are all expected to receive measurable rain from Wednesday through Friday, with up to 2 inches in some areas. Crews have been doing their best to pack ahead, but the reality is that wet fields slow everything down.

Out in the desert, growers are just getting started. Early romaine and iceberg lots are coming in with clean products, but still running light on weights, but all things that will all settle out with better weather. The week of the 17th is when all processors will be in the desert, and those fields look promising. We just need to give them another 10 to 14 days to build momentum.

Spring mix and baby leaf supplies have been inconsistent. Arugula is the tightest right now, especially after the storms earlier this month, but color and texture are improving in newer lots. Yields are still off, and no one has much extra to spare, but the bleeding has slowed.

Strawberries remain one of the toughest items out there. With a potential for up to 3.00 inches of rain this weekend, Santa Maria will likely be knocked out of production. Oxnard is hanging in with decent fruit, and Central Mexico is crossing a little more each week, just not fast enough to meet demand. Baja is still two weeks out. Additional weaker weather events on the forecast will continue to disrupt supply through Thanksgiving. Melons are almost done in the desert, with cantaloupe finishing up this week and honeydew expected to last a few more weeks. Offshore arrivals from Central America will start hitting Florida and the coasts over the next couple of weeks, but it'll be tight until they're fully in.

Back east, a hard freeze hit parts of North Carolina, Georgia, and North Florida. Most reports suggest damage was limited, but yields could still dip a bit in the weeks ahead. Florida has just started up, and with Georgia winding down, expect more pressure on the western supply as we move toward December.

This week marks a real turning point. The weather will continue to challenge the West Coast, but with the desert ramping up, every day we're seeing progress. It'll take a little more time for volume and weights to catch up, but we're heading in the right direction. Better days and better availability are just ahead.



JOEY PIEDIMONTE
SOURCING MANAGER