

# The Source

## Commodity of the Month - Apples

### MARKET ALERTS

**Brussel Sprouts:** Brussels sprout supplies remain limited due to insect pressure, decay, and smaller sizes in Salinas Valley and Oxnard growing regions.

**Pineapple:** Thunderstorms in Costa Rica will persist through September, limiting pineapple supplies for the year. Crownless pineapples are in high demand, with weather-related shortages expected. Transportation from Mexico remains stable.

SEPTEMBER 17, 2025

### CROP UPDATES

Early signs for the 2025–26 California Navel orange crop are promising, with the USDA projecting 80 million cartons — up 6% from last year. Fruit sizing is trending larger (peaking on 72s and 88s), a shift from last season's smaller sizes. This should create more retail opportunities, especially for bag and bulk programs. Harvest begins in early October, with early picks showing light color but good internal quality. Sizing and volume are expected to improve through mid-December, pointing to a strong, promotable season ahead. [Read more](#)

### WEATHER

**California:** The heat wave ends today, with above-average temps inland. A cooling trend with clouds and slight shower chances moves in through the weekend. Friday will be the coolest day before warming returns.

**Mexico:** Isolated showers continue through the weekend with light rainfall. Temps stay seasonably warm, with highs in the 70s–80s and lows in the mid 50s–low 60s through Sunday.

**Florida:** Isolated to scattered showers continue south; north Florida sees increased chances this weekend. Warm temps persist, with highs in the mid 80s–low 90s and lows in the 70s.

**Arizona:** Tropical moisture brings rain and storm chances Wed–Fri, with Thursday most active. Showers taper by weekend, mainly in central AZ. Temps slightly cooler; warm mornings continue.

### IN PEAK SEASON:

- Blackberries



- Raspberries



- Grapes



### FREIGHT

Freight this week continues to inch closer to transition and to the southern growing regions. Product is being spread out across the growing regions creating long loading times for carriers especially out west. Idaho outbound continues to be a struggle with trucks being very tight. CA to FL is also seeing continuing signs of tight truck supply and elevated markets.

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# Commodity Updates



## Apples

September marks the kickoff of the 2025–2026 apple season, with nearly all major varieties beginning to pick and pack new crop this month. Early indicators point to a strong production year for the apple industry, with most varieties expected to match or exceed last year’s volumes. Honeycrisp is leading the way, projected to come in over seven million cases above last season — a 64% increase. While it’s still too early to determine exact size profiles for every variety, the overall outlook suggests a very favorable supply situation for foodservice this year.

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



## Asparagus

Asparagus supplies are beginning to improve out of both Mexico and Peru, with volumes gradually increasing. As a result, the market is expected to ease slightly heading into next week. Quality has also shown noticeable improvement and is trending positively moving forward.

Commodity/Region	Supply	Price	Quality
<del>Caborca</del> (Year Round)	Light	\$\$\$	Fair
Ciudad Obregon (Year Round)	High	\$\$\$	Good
Peru (Year Round)	High	\$\$\$	Good



## Avocados

Peak sizes are currently 48ct and 60ct, with Flora Loca as the primary crop. Fruit quality is excellent, with very minimal #2 grade—typical for this time of year. The California season is gradually winding down and is expected to wrap up in the coming weeks. Offshore arrivals continue on both coasts, though volume is significantly lighter as that season nears its end. Remaining offshore fruit is primarily jumbo-sized.

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



## Bell Peppers

Steady supplies continue out of Michigan, New York, North Carolina, New Jersey, and California, with promotable volume available. Overall quality remains good, with only minor weather-related discoloration reported. Colored bell pepper supplies out of Oxnard are increasing, and the market is beginning to ease.

Commodity/Region	Supply	Price	Quality
California (May - June)	Steady	\$\$\$	Excellent
Ohio (Jun - Sept)	Steady	\$\$\$	Good
<del>Mexico</del> (Jun - Sept)	Steady	\$\$\$	Good

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

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# Commodity Updates



## Berries (Blackberries)

This item continues to move steadily into October, with solid volume coming out of California, Central Mexico, and Baja. Volume deals are being offered, making it a favorable time for promotable opportunities.

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



## Berries (Blueberries)

The Pacific Northwest season has officially wrapped up. Peruvian imports are now beginning to dominate the market, with Central Mexico expected to follow in October. Quality out of both regions is being reported as excellent.

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



## Berries (Raspberries)

This item remains steady heading into October, with strong volume coming out of California, Central Mexico, and Baja. Volume deals are being offered, making it an ideal time for promotional opportunities.

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



## Berries (Strawberries)

We're currently seeing a two-tiered market developing between the new crop out of Santa Maria and Oxnard and the older plantings in the Salinas and Watsonville regions. Quality in the northern areas is beginning to decline as the season winds down, leading to rougher product compared to the fresher southern harvests.

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

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

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Only the Finest Berries™



# Commodity Updates



## Broccoli

Broccoli supplies remain slightly limited but are showing gradual improvement, with the market slowly easing. Expect modest gains in availability heading into next week.

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



## Brussel Sprouts

**ALERT**

Brussels sprout supplies continue to be limited. Growing regions in the Salinas Valley and Oxnard are facing challenges from insect pressure, some decay, and smaller sizing.

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



## Carrots

Harvest is underway in the Cuyama/Lancaster area and will continue through November. No sizing issues are expected in the near future. Please remember to 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)	Steady	\$\$\$	Good



## Cauliflower

Cauliflower supplies and quality remain strong across all growing regions this week. Expect similar conditions to continue into next week.

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



## Celery

This market is showing some strength in both Northern and Southern California. All sizes remain available, with quality reported as above average by most shippers. Only slight seeder issues have been noted. Expect supplies to stay steady throughout the week.

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 now, peaking at 48ct, and are shipping out of Riverside and the San Joaquin Valley.

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



## Citrus (Lemons)

Markets remain strong across all sizes. District 2 (Ventura/Oxnard) is the main production area, though volume is declining weekly. Smaller sizes (140ct and below) are extremely limited. District 3 (CA Desert/AZ) is starting with light volume. Compared to last summer, markets are elevated due to higher demand and reduced import supplies. Offshore arrivals remain light on both coasts, and Mexico's season has begun with lower projected volume year over year.

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)

Markets are slightly lower as crossings increase; however, quality concerns persist, including lighter color, thinner skin, spotting, and shorter shelf life. The new crop is producing smaller sizes (250s/230s), while larger fruit (110s/150s) is still from the old crop. Offshore Colombian fruit continues to supplement supply through Florida.

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



## Citrus (Oranges)

Valencias are currently peaking on 72ct, with about a month left in the season. Gas times are averaging 3-4 days to address regreening. School demand has surged, driving up markets on 88ct, 113ct, and 138ct as availability tightens. The domestic Navel season is expected to start around mid-October.

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



## Cucumber

Supply remains steady from Michigan, New York, Canada, Baja, and Central Mexico. Baja is leading in both volume and quality, while harvests in North Carolina and Georgia are ramping up soon. The market is expected to be active as the season transitions south to Georgia and Nogales.

Commodity/Region	Supply	Price	Quality
Baja California (May - October)	Steady	\$\$\$	Good
Ohio/NC/MI/NJ (June - September)	Light	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good

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

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# Commodity Updates



## Eggplant

Good, steady supply continues from the East with strong quality. North Carolina is shifting south, while Fresno, CA remains steady through late October. Washington is producing excellent fruit for the Northwest market.

Commodity/Region	Supply	Price	Quality
Ohio/NC/MI (June - September)	Steady	\$\$\$	Good
California (May - October)	Steady	\$\$\$	Good



## Garlic

The new California garlic crop is progressing well with good quality, while Mexican supplies continue to complement the California harvest.

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 domestic grape market continues to progress steadily with excellent quality as we transition from mid-season varieties into the fall picks. While the market is poised to push prices higher, ideal weather conditions and abundant inventories are currently keeping prices stable.

### 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

The green onion market is slightly higher compared to last week, but supplies remain good. Expect the market to stay steady heading into next week.

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



## Kale

Kale supplies and quality are expected to remain strong this week, with similar conditions projected for 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

Warm weather in the growing regions has accelerated growth, resulting in good supplies of this commodity that are expected to continue throughout the week. Weights are averaging between 39 and 44 pounds, depending on the shipper. There have been minimal reports of slight misshapen heads and some outer leaf discoloration. Current production is coming from the Salinas Valley and Southern California.

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

Overall, the market remains steady on romaine as well as green and red leaf lettuce. Improved supplies of romaine hearts have emerged this week, with a few shippers offering some flexibility. Expect to see some fringe and tip burn due to the warm temperatures in the growing regions. Sizing and weights have been favorable across all leaf items.

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 items are expected to be in good supply this week, with quality remaining strong. Similar conditions are anticipated 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	\$\$\$	Good
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Yuma, AZ (Nov. - May)	Steady	\$\$\$	Good
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## Melon (Cantaloupe)

The domestic cantaloupe market is beginning to firm up due to sizing from Westside fields. The second cut and rising demand are driving the market. Fields are still heavy on 9s, but sizing on 12s and 15s is improving. Brix levels are strong, ranging from 13-16.

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 domestic honeydew market is beginning to firm up as sizing improves from Westside fields. The second cut and increased demand are driving the market, with fields still heavy on 5s but showing better availability on 6s and 8s. Mexican honeydews are expected to start in early October, weather permitting.

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 available on both coasts, with prices beginning to stabilize as growers push new crops. Mexican watermelons are also coming in through Texas.

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

Excellent supply and availability with strong promotable volumes.

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

Onions are currently shipping out of Washington and Idaho, as the California and New Mexico seasons have ended. Demand remains strong across the U.S. Rain in Idaho may impact harvest schedules and will need to be closely monitored.

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

Pears are experiencing a production situation very similar to apples. California kicked off the new season with a heavy crop, priced competitively to encourage movement. Washington is following suit, and it looks like all pear varieties will be available in promotable volumes with excellent quality.

Commodity/Region	Supply	Price	Quality
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Sacramento Valley (July-September)	Light	\$\$\$	Good
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 continue to impact growing regions in Costa Rica and are expected to persist through the end of September 2025. Pineapple supplies remain very limited and may continue to be constrained for the remainder of the year. Crownless pineapples are in high demand. Expect substitutions and shortages driven by weather-related challenges in Central America. Transportation out of Mexico remains stable, with good truck availability to support pineapple shipments.

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



## Potatoes

Idaho's 40-70 count market has stabilized with new crop Norkoths now leading; Burbanks are finished. New fields are mostly #1 grade, with #2s tight. Washington's new crop offers smaller sizes and great quality. Color potatoes come from CA, ID, MN, WA, and WI. North Carolina's new sweet potatoes have started in small volumes, with some curing issues to resolve soon.

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



## Squash

Supplies remain stable in both the East and West. New Jersey's season is winding down, while Georgia's is just beginning. Baja and Santa Maria are supplying good-quality fruit, with Sonora starting to cross product into Nogales.

Commodity/Region	Supply	Price	Quality
Mexico (June - September)	Steady	\$\$\$	Good
Ohio (June - September)	Steady	\$\$\$	Good
California (May - October)	Steady	\$\$\$	Good



## Stone Fruit

Peach and nectarine seasons are wrapping up this month, while plums will continue into late fall. Imported kiwis remain steady but at higher prices, with Chilean growers shifting focus to Europe due to tariff concerns. California kiwi is set to start in late September or early October, with strong demand expected to support current prices. Fall fruits like pomegranates and persimmons also begin this month.

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



## Tomatoes

Strong volumes continue from Tennessee, Virginia, and other Eastern states, as well as Canada, Michigan, Alabama, and North Carolina. Western supplies remain steady out of California, Baja, and Central Mexico, with solid quality reported. The market is expected to remain steady through mid-October.

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

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

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# Weather Updates



## CALIFORNIA

The heat wave ends today, though temperatures will remain above average away from the coast. Morning lows will range from the low 50s to mid 60s, with daytime highs reaching upper 60s to upper 70s near the coast, mid 80s to mid 90s in the coastal valleys, and mid 90s to 103 south of Soledad. An upper low moves into the region tonight, bringing increased cloudiness, cooler temperatures, and a slight chance of showers through the weekend. Friday will be the coolest day, with highs in the mid 60s to low 70s near the coast and upper 70s to upper 80s inland, before a warming trend begins as the low moves out over the weekend.



## MEXICO

Shower activity will remain widely isolated through the weekend, with rainfall totals generally between 0.05" and 0.20", though some thunderstorms could bring higher amounts. Temperatures will stay seasonably warm through September 21st, with highs ranging from the low 70s to low 80s through Thursday, mid 70s to mid 80s on Friday, and upper 70s to upper 80s over the weekend. Overnight lows will be in the mid 50s to low 60s through Sunday morning.



## FLORIDA

Isolated to scattered showers and thunderstorms are expected mainly across the southern half of the state through the end of the week. Shower chances will increase over northern Florida as we move into the weekend. Temperatures will remain warm over the next five days, with highs in the mid 80s to low 90s and lows ranging from the low to upper 70s through Sunday morning.



## ARIZONA

Starting Tuesday evening, scattered plumes of tropical moisture will drift into the low deserts from the south, increasing chances of rain and thunderstorms across the entire forecast area from Wednesday through Friday. Forecast confidence on timing and rainfall totals remains low, as models have shown significant variability. Currently, Thursday appears to have the highest likelihood of thunderstorms with rainfall potentially exceeding ¼". By Saturday and Sunday, any remaining showers should be confined mostly to central Arizona. High temperatures will be a few degrees cooler than average, while morning lows remain warmer than normal through the weekend.

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



# Freight Updates



Freight this week continues to inch closer to transition and to the southern growing regions. Product is being spread out across the growing regions creating long loading times for carriers especially out west. Idaho outbound continues to be a struggle with trucks being very tight. CA to FL is also seeing continuing signs of tight truck supply and elevated markets.



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

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

	09/01/25	09/08/25	09/15/25	Change from	
				week ago	year ago
U.S.	3.734	3.766	3.739	↓ -0.027	↑ 0.213
East Coast (PADD1)	3.750	3.772	3.748	↓ -0.024	↑ 0.163
New England (PADD1A)	3.948	3.955	3.961	↑ 0.006	↑ 0.143
Central Atlantic (PADD1B)	3.912	3.937	3.920	↓ -0.017	↑ 0.110
Lower Atlantic (PADD1C)	3.669	3.693	3.663	↓ -0.030	↑ 0.184
Midwest (PADD2)	3.722	3.754	3.710	↓ -0.044	↑ 0.229
Gulf Coast (PADD3)	3.367	3.404	3.389	↓ -0.015	↑ 0.217
Rocky Mountain (PADD4)	3.753	3.754	3.722	↓ -0.032	↑ 0.134
West Coast (PADD5)	4.484	4.533	4.523	↓ -0.010	↑ 0.279
West Coast less California	4.112	4.163	4.134	↓ -0.029	↑ 0.316
California	4.914	4.958	4.971	↑ 0.013	↑ 0.238

*\*prices include all taxes*

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



# Crop Updates

After a season dominated by small fruit, especially during the peak of the Navel window, early signs for the 2025–26 California Navel orange crop are encouraging. This year's crop is expected to increase in both size and volume, with the latest USDA estimate projecting 80 million cartons, a 6% rise over last year.

Early field reports suggest that the size curve is trending larger, with fruit peaking on 72s and 88s. That's a shift from last season, where much of the crop favored 113s and 138s, and leaned heavily toward foodservice. If sizing continues as forecasted, this year's crop will present more promotable opportunities for retail, particularly around bag and bulk programs.

Harvest is expected to begin in early October. As with most early-season fruit, we can expect light orange coloring and smaller sizes in initial picks. Growers will likely use gas to bring out color on early fruit, but it's worth reminding customers that light-skinned Navels still eat well. Their internal quality and sugar levels are typically right on target, even if the outside isn't fully orange.

Size distribution is expected to increase as the season progresses, with more consistent, larger fruit by mid-December. Growers will continue evaluating the groves over the next few weeks, but so far, this season is shaping up to be a more balanced and promotable Navel deal.



**JOEY PIEDIMONTE**  
**SOURCING MANAGER**