

The Source

Commodity of the Month - Grapes

MARKET ALERTS

Cauliflower: The cauliflower market continues to gradually rise as fields experience a slight gap. Expect this upward trend to continue into the weekend.

Citrus (Lemons): Markets remain strong with tight supplies on 140-count and smaller fruit. District 1 is winding down as District 2 ramps up, with more volume expected around June.

Citrus (Limes): The market remains strong, especially for larger fruit. Smaller sizes (23/250, 275ct) are peaking due to demand trends, limited offshore supply, and low rainfall.

IN PEAK SEASON



MAY 28, 2025

CROP UPDATES

The 2024–25 California Valencia orange crop is forecasted to be down 20% from last season, with production estimated at 15 million cartons. The decline is due to reduced acreage and smaller fruit size, despite a slightly higher fruit count per tree. Harvest has begun and will pick up as Navel season ends mid-June. [Read more](#)

WEATHER

California: A heat wave builds through the weekend with tapering winds. Temps will rise from 60s–90s midweek to 70s–108° by Friday.

Mexico: Cooler temps with scattered showers and storms expected through Saturday; heavier rain possible. Highs range from 70s–80s, with lows in the mid 50s to mid 60s.

Florida: Scattered storms continue through Thursday, with a stalling cold front bringing increased rain Friday–Sunday. Highs dip from 90s to 80s; lows stay in the 60s–70s. Gusty winds (15–25 mph) expected in SE Florida and Tampa Bay through May 30.

Arizona: Warming continues through Friday, with temps peaking ~10° above normal. A stalled low draws in tropical moisture, increasing humidity and bringing a slight chance of scattered showers in Yuma Co. and central AZ Saturday night–Sunday. Highs drop to the 90s in AZ and 100–105 in SE California by Sunday.

FREIGHT

Freight this week sees weather continue to warm up out west meaning shipper delays are improving. We anticipate the next 5–6 weeks to be busy with a demand for trucks as more product comes on.

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Commodity Updates



Apples

The apple market remains stable, with prices holding firm—highlighting the durability of the product and its excellent storage qualities. Supply is strong across most varieties, particularly for foodservice sizes. However, availability remains limited for Honeycrisp and Cosmic Crisp apples, especially in smaller sizes.

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



Asparagus

Domestic supplies are available in both Washington and Michigan. The market is expected to remain steady this week, supported by consistent production from Mexico and Peru.

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



Avocados

Markets have stabilized as Mexico slows its harvest. Offshore fruit is now available on both coasts. Supplies of 48-count and smaller sizes have improved, while larger fruit continues to face challenges. Approximately five weeks remain in the Normal crop season before Flora Loca begins. Meanwhile, the California season is in full swing.

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



Bell Peppers

Georgia is seeing strong volumes, though post-holiday demand has softened. Eastern Carolina and other local programs are set to begin in late June and will run through the summer. Supplies out of Mexico are tightening, with some quality concerns emerging. Meanwhile, production in the California desert remains steady, with excellent quality.

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

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

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Commodity Updates



Berries (Blackberries)

Post-holiday demand has softened. Supplies remain adequate while demand stays low. Product continues to arrive from Central Mexico, with light production from California and Georgia.

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

Good supplies are coming out of Georgia, while Central California is seeing moderate production.

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

Volumes from Mexico are increasing, leading to softer markets. California production is set to begin in early June.

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

Ideal weather conditions combined with lower demand have created a buyers' market this week. Fruit quality remains strong across all growing regions.

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 excellent, with strong color and sizing in the fields. The market is expected to stay steady heading 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 continue to improve this week, with the market 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 desert Imperial Valley region will continue through the end of the month before shifting back to the Bakersfield area. Lake Park, GA is in its final week of shipping. A reminder to submit snack pack orders 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)	Light	\$\$\$	Good



Cauliflower

ALERT

The cauliflower market continues to gradually rise as fields experience a slight gap. Expect this upward trend to continue into the weekend.

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



Celery

Demand remains moderate at best, with the market holding steady overall. All sizes are currently available, and this is expected to continue throughout the week. Larger sizes offer the best availability. Overall quality remains strong. The additional delivery charge for loads outside the Santa Maria/Oxnard area is expected to remain in place.

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, primarily in 40-count and larger sizes, shipping from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

ALERT

Markets continue to remain strong. Supplies of 140-count and smaller fruit are tight, with small fruit expected to stay snug until District 2 increases volume around June. District 1 (San Joaquin Valley) is nearing the end of its season, while District 2 (Ventura County/Oxnard) is ramping up production week by week.

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



Citrus (Limes)

ALERT

The market remains strong, particularly for larger fruit sizes. Smaller sizes (23/250 and 275ct) are peaking in response to growing consumer trends. Limited offshore supply and low rainfall have both increased demand and the availability of smaller fruit.

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



Citrus (Oranges)

The Navel season is past its peak and is expected to conclude by June. Small fruit will remain limited for the remainder of the season. Suppliers are closely monitoring remaining Navel field projections to determine the best strategy for fulfilling contracts. The aim is to maintain coverage while delaying the start of the Valencia season to ensure adequate supply through the fall. Expect the Valencia season to ramp up at the beginning of June.

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



Cucumber

Georgia remains the primary cucumber supplier in the East, offering strong volume. In the West, Sonora and Sinaloa have adequate supplies, with 2-3 weeks left in their seasons, weather permitting. Meanwhile, Baja and Central Mexico are ramping up new crop production, delivering high-quality cucumbers across the regions.

Commodity/Region	Supply	Price	Quality
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 price levels. Mexican eggplant prices have declined, while domestic prices are on the rise. Supply is adequate, bolstered by improved production in Georgia.

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



Garlic

Garlic quality remains strong, with steady supplies expected in the coming weeks. Mexican peeled garlic began shipping last 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 is adjusting downward as Mexican imports increase in volume. Quality remains good, with sizing tending smaller. Chilean grapes are winding down and prices are also falling. Domestic grapes from Coachella are steady but holding at higher price points.

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 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 are expected to remain steady 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 in this market is moderate, with supplies expected to remain above average throughout the week. Shippers are flexible on volume-type orders, so promoting heavily is encouraged. Aside from minor pinking on the ribs and some misshapen heads, quality remains strong across the industry. Weights continue to be reported between thirty-nine and forty-four pounds.

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



Lettuce Leaf

Romaine, along with green and red leaf, will have ample availability throughout the week. Demand is soft. Supplies are strong in Salinas and moderate in Southern California. Romaine hearts are also expected to be readily available all week, with good quality reported. Minimal tip and fringe burn are being noted industry-wide.

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



Lettuce Tender Leaf

All tender leaf lettuce varieties are seeing good supply and strong overall quality. Fields are showing consistent sizing, texture, and color. This trend is expected to continue through the weekend.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Yuma, AZ (Nov. - May)	Steady	\$\$\$	Good



Melon (Cantaloupe)

The cantaloupe market is strong, driven by recent retail promotions. The domestic cantaloupe season is underway, offering great quality with favorable Brix levels, good sizing, and solid availability. Mexican and offshore melon seasons are winding down.

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

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

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Commodity Updates



Melon (Honeydew)

The honeydew market is strong, fueled by recent retail promotions. Mexican cantaloupes from Nogales offer improved sizing and availability. Meanwhile, the domestic melon season has begun.

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 currently available in Florida and will begin coming from California in June. Mexican watermelon supplies are increasing just in time for the Mother's Day pull. Suppliers anticipate strong demand for the upcoming holidays, with volume deals available. Domestic watermelons WILL BE AVAILABLE IN JUNE.

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 in the PNW and Texas is nearly done, with Mexican imports running through July. California desert contracts are active and will shift to Central CA by mid-June. LTL and FTL deliveries available. New Mexico onions have good quality and sizing. Georgia onions come in all colors but face quality and sizing issues after recent rain.

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 remains stable to slightly lower, despite limited supply. The market is expected to stay largely unchanged until at least mid-July, when California's new Bartlett crop becomes available.

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

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

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Commodity Updates



Pineapples

Pineapple supplies are more abundant this week, with minimal need for substitutions. Good volumes are coming out of Costa Rica, and shell color is looking strong.

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

The market is steady with stable pricing and a preference for delivered pricing. Deals are available as storage supplies transition to new crop. Planting is underway, including in Eastern Idaho. Interest in CA color potatoes is rising as other regions' quality declines. Demand for yellow potatoes is increasing. Color potatoes are available from CA, ID, ND, WI, and FL.

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



Squash

Good overall supply of squash is available from multiple regions, including Nogales, Santa Maria, Selma, Georgia, and North Carolina. As Nogales production winds down, prices have edged slightly higher in the West, but supply and quality remain strong. Expect more local programs to ramp up as we approach the summer months.

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



Stone Fruit

The domestic stone fruit season is underway, with peaches and nectarines showing improving volume daily. Apricots and California cherries remain in very limited supply, keeping their markets elevated. Plums have begun arriving, and Washington cherries are set to start next week.

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

Eastern tomato supplies are steady but declining, with modest volumes from Georgia and the South expected soon. Baja production is rising, and Central Mexico is starting to boost supply. U.S. supply is fading, with Mexico set to increase volumes in June and beyond.

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

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

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Weather Updates



CALIFORNIA

High pressure continues to build this week, bringing a heat wave through the weekend. Afternoon winds, which may gust up to 40 mph on Wednesday, will gradually taper off. Morning lows will range from the low 40s to low 50s on Wednesday, warming to the low 50s to mid 60s by Saturday. Coastal daytime highs will rise from the low 60s–70s on Wednesday to the low 70s–80s by Friday. Inland areas will see highs climb from the low 70s–90s on Wednesday to 95–108 degrees by Friday.



MEXICO

Slightly cooler temperatures and isolated to scattered showers and thunderstorms are expected Wednesday through Thursday. Shower and storm activity will become more scattered Friday into Saturday, with potential for heavier rainfall. By Sunday, showers will become more isolated.

Highs will range from the mid 70s to mid 80s on Wednesday, cooling slightly to the low 70s to low 80s Thursday through Saturday, and returning to the mid 70s to mid 80s on Sunday. Morning lows will stay in the mid 50s to mid 60s throughout the weekend.



FLORIDA

Isolated to scattered showers and thunderstorms are expected through Thursday. From Friday through Sunday, a cold front will move across the state and then stall, increasing the chance of wet weather over the peninsula. Temperatures will remain warm where daytime heating isn't limited by showers, with highs in the low to mid 90s through Thursday, then cooling to the low to upper 80s Friday through Sunday. Lows will range from the upper 60s to mid 70s through Friday morning, then settle in the mid 60s to mid 70s over the weekend. Winds will gust between 15 and 25 mph across most of Southeast Florida and the Tampa Bay area through May 30th.



ARIZONA

Warming conditions over the low-deserts through Friday when temps peak about 10 degrees above seasonable normal. A cut-off low stalled west of northern Baja drifts inland starting Friday, drawing in tropical moisture from the south. Humidity increases Saturday and chances for light scattered showers appear over Yuma Co. and central Arizona Saturday night through Sunday. A minimal risk of measurable rain in southeast California Sunday morning. Coverage and timing of rain is very uncertain for now. Highs drop back into the 90s in Arizona by Sunday, 100-105 in southeast California.

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

Freight Updates



Freight this week sees weather continue to warm up out west meaning shipper delays are improving. We anticipate the next 5-6 weeks to be busy with a demand for trucks as more product comes on.



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

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

	05/12/25	05/19/25	05/26/25	Change from	
				week ago	year ago
U.S.	3.476	3.536	3.487	↓ -0.049	↓ -0.271
East Coast (PADD1)	3.534	3.580	3.555	↓ -0.025	↓ -0.330
New England (PADD1A)	3.877	3.897	3.882	↓ -0.015	↓ -0.266
Central Atlantic (PADD1B)	3.777	3.788	3.801	↑ 0.013	↓ -0.322
Lower Atlantic (PADD1C)	3.408	3.469	3.428	↓ -0.041	↓ -0.342
Midwest (PADD2)	3.416	3.481	3.428	↓ -0.053	↓ -0.205
Gulf Coast (PADD3)	3.143	3.201	3.136	↓ -0.065	↓ -0.342
Rocky Mountain (PADD4)	3.463	3.512	3.445	↓ -0.067	↓ -0.261
West Coast (PADD5)	4.211	4.296	4.248	↓ -0.048	↓ -0.201
West Coast less California	3.735	3.828	3.763	↓ -0.065	↓ -0.219
California	4.760	4.835	4.808	↓ -0.027	↓ -0.177

*prices include all taxes

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

Crop Updates



The California Valencia orange forecast for the 2024-25 season is projected to be down approximately 20% from last season. The forecast is the result of the 2024-25 Valencia Orange Objective Measurement Survey conducted from mid-January to early February in cooperation with the California Department of Food and Agriculture (CDFA) and the USDA.

A sample of 330 Valencia orange groves were randomly selected proportional to acreage, county, year planted, and variety representation in the state, with 301 of these groves being utilized in this survey. The sampled groves were primarily in the top Valencia orange producing counties of Tulare, Kern, San Diego, and Ventura.

Once a grove is randomly chosen, two trees are randomly selected from each grove. For each randomly selected tree, its trunk is measured along with all connected branches. The final randomly selected branch, called the terminal branch, is then closely inspected to count all fruit connected to it and all fruit along the path from the trunk to the terminal branch.

Survey data indicated an average fruit set per tree of 552, a 4.3% increase from the previous year and 1.1% below the five-year average of 558. The average March 1 diameter was 2.392 inches, down 1.7% from the previous year and down 2.8% from the five-year average of 2.461. Overall acreage is at 25,000 acres down from 25,500 acres the prior season. Final estimates project production at 15 million cartons compared to 18.6 million last season.

Light harvests have begun, as the Navel season quickly winds down around by mid-June, Valencia's will take over production for the summer and fall.



TIM LYNCH

QUALITY ASSURANCE MANAGER