

The Source

Commodity of the Month - Avocados

MARKET ALERTS

Asparagus: Mexico's asparagus supply is rising but still below normal, with good quality, smaller sizes; Peru's volumes will increase by early December, keeping markets firm.

Blackberries: Markets steady, but Mexican shipments delayed by labor strike road blockades.

Brussel Sprouts: Brussels sprout supplies are very limited due to insect pressure, decay, and small sizing.

Cantaloupe: Westside cantaloupe supplies are low, keeping prices high with mostly 9s; sizing is limited, with offshore arrivals expected by mid-November.

Grapes: Grape supplies are tightening, pushing markets up, with greens tighter than reds for the season.

Lettuce (iceberg): Huron production is up with better weights than Salinas, but demand still exceeds supply, pushing value-added prices higher.

Lettuce Leaf: Demand exceeds supply for romaine and leaf greens; weights are light, value-added prices high, and Huron production is moderate.

Strawberries: Market is tight with demand exceeding supply; limited Central Mexico and Florida harvests will slowly ease pressure over November.

OCTOBER 29, 2025

CROP UPDATES

Cooler, drier weather in the West is easing some crop pressures, but storm impacts still affect quality and weights for lettuce and leafy greens. Mexican imports and Huron harvests provide limited relief ahead of the full desert transition around Nov 17. California navels have started, Valencia tapers, and District 3 lemons improve, while berries remain tight, especially strawberries, with modest gains in raspberries, blackberries, and blueberries. Supply and quality issues persist, making careful planning essential. [Read more](#)

WEATHER

California: High pressure keeps temps near to above average through the weekend, with lows in the 40s–50s and highs 70s–80s. Offshore winds ease Thursday, allowing coastal cooling as the marine layer returns.

Mexico: Warm, mostly dry weather continues through the weekend, with highs 70s–80s and lows 40s–50s.

Florida: A few evening sprinkles are possible Wednesday in Northern Florida, followed by cooler, drier mornings and warmer days late in the week.

Arizona: Low desert stays 5–10°F above normal through the weekend, with highs 80s–90s, lows 50s–60s, and winds easing after Wednesday.

FREIGHT

Freight this week sees several challenges. From Non-Domiciled CDL laws affecting driver availability, the Sikh Religious Holiday of Diwali also creating an active freight market. This is in addition to transition into winter growing regions and the near end of the Salinas growing season. Add in some rain and transition is officially upon us. Expect significant loading delays and the need for out of route pickups to fill trucks. This will be the pattern for the next three to four weeks as we approach Yuma. Don't forget that Pro*Fresh does LTL from both Salinas and Los Angeles, as well as cross docking and interstate transfers! So don't miss that Oxnard Berry pickup, send it to us and we can deliver to the region you are loading in! Ask Riddle for more on that.

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Commodity Updates



Apples

Inventories of foodservice-size apples remain moderate to light, with the market holding steady.

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



Asparagus

ALERT

Mexico's asparagus volume is rising from Baja California Sur and Sonora as new fields open ahead of Thanksgiving, though yields remain low from earlier rain. Production in Caborca, Hermosillo, and Sonoyta is strong but about half of last year's, with good quality and smaller sizes. Peru's northern fields are ramping up, with heavier arrivals expected by early December. Overall supply is improving but still below normal, keeping markets firm, especially on larger sizes.

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 as trees hold ample fruit and demand is low. Currently, Flora Loca and Aventajada are the main crops being harvested and shipped, with both showing similar dry matter and oil content in the mid-to-high 20% range.

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



Bell Peppers

Western markets remain firm as Coachella begins light green production, with shippers consolidating loads in the valley alongside other warm veg. Oxnard still has some volume but is past its peak. Nogales is about three weeks from starting. Eastern supply remains strong with promotable volumes, and North Florida is set to start later this week.

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

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

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Commodity Updates



Berries (Blackberries)

ALERT

Markets remain steady on this item from Mexico, though loading delays persist due to road blockades tied to ongoing labor strikes.

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



Berries (Blueberries)

Steady Peruvian arrivals are putting downward pressure on the market, while Mexican production continues to increase into November and is expected to peak in December.

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



Berries (Raspberries)

Markets remain steady on this item from Mexico, though loading delays continue due to road blockades caused by ongoing labor strikes.

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



Berries (Strawberries)

ALERT

The market remains extremely tight, with demand exceeding supply. Shorter daylight hours and cooler temperatures are contributing to reduced yields. We anticipate this limited supply trend to continue throughout November. Central Mexico production is expected to increase over the next few weeks, helping to offset some of the excess demand currently being experienced in California. Florida will begin harvest next week in a very limited capacity, with only pallet quantities being harvested as crews work to maintain the ranches until the full season begins in 3-4 weeks.

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

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

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Commodity Updates



Broccoli

Broccoli supplies remain limited but are beginning to improve. Some pin-rot from crown moisture is reducing yields, though mostly manageable. Insect pressure remains a key concern. The market is expected to soften slightly heading into the weekend.

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



Brussel Sprouts

ALERT

Brussels sprout supplies remain extremely limited, with growers in Salinas Valley and Oxnard facing ongoing 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 region and will continue through November. Sizing is consistent with no expected issues. Please place 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)	Steady	\$\$\$	Good



Cauliflower

Cauliflower supplies remain limited but are showing improvement this week. Expect the market to ease slightly heading 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

Demand is up this week in both Northern and Southern CA, with higher pricing on value-added products. Large sizes are most available. Expect the market to strengthen weekly ahead of Thanksgiving, with quality reported as above average.

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, peaking at 48ct, and 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)

Markets remain strong, though District 1 (San Joaquin) is starting light. Volume is low as fruit needs gassing to color. District 3 (CA Desert/AZ) is the main region, but supplies will decline. 14Oct and smaller remain tight. Mexico is also available for South Texas loads.

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)

The market is trending lower as more limes shift from the Mexican domestic market to export, increasing cross-border volume. Quality may vary, so be cautious with lower-priced offers. Smaller sizes are tightening, with fruit peaking on 110s, 150s, and 175s. Offshore Colombian and Honduran fruit remain available in the East.

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



Citrus (Oranges)

California navels are ramping up, with markets improving as more fruit comes online. Peak sizing is 72/88/113ct, and fruit is being gassed for 4-5 days to enhance color.

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



Cucumber

Lighter Eastern production has firmed up Western prices, while strong Mexican output is helping to keep the market in check. Product is available through San Diego and Nogales.

Commodity/Region	Supply	Price	Quality
Baja California (May - October)	Light	\$\$\$	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

Cooler weather in Georgia has sharply reduced eggplant production, tightening supplies and pushing FOB prices higher. Florida's new crop should begin in 7-10 days, easing the shortfall. California supplies remain steady, and Mexico's first harvest is underway with stronger volume expected next week.

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



Garlic

California garlic is progressing with good quality, complemented 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 continues to rise as recent weather and seasonal factors tighten supplies. Greens are expected to remain tighter than reds for the rest of the domestic season.

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

Huron production is increasing with multiple suppliers, while Salinas remains moderate with lighter weights. Huron weights are better at 37-39 lbs and cleaner than Salinas. Demand continues to exceed supply, with third-tier price escalations on value-added products.

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



Lettuce Leaf

ALERT

Demand exceeds supplies on romaine, butter, and green and red leaf. Value-added items remain on third-tier escalation all week. Romaine hearts will be light throughout the week. Arrivals of all leaf items show light weights with fringe and tip burn. Huron production is moderate at best.

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



Lettuce Tender Leaf

Tender leaf supplies remain tight due to lower yields from insects and recent hail, with limited availability expected into next week.

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



Melon (Cantaloupe)

ALERT

The Westside season is winding down, with cantaloupe pricing elevated due to rain-related yield losses. Markets remain high with triggers in effect until supplies improve. Fields are producing mostly 9s, and sizing will stay challenging through the end of the domestic season. Offshore arrivals are expected by mid-November, and rains in Jamaica have so far missed key growing areas.

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

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

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Commodity Updates



Melon (Honeydew)

Honeydews are available from both domestic sources and Mexico. The domestic transition was delayed by heavy rains, while Mexican fruit is shipping through Nogales. Fields are producing mostly sizes 4, 5, and 6.

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, though supplies are very light and prices are rising as volumes decline. Mexican melons through Texas and Nogales are limited, with quality still affected by last month's rain.

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

Mushroom supplies are tightening as growers enter the holiday pull, with limited availability expected throughout the season.

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

Onions are available from WA, ID, and UT, with strong domestic demand. Rain in Idaho may affect harvest schedules, and both trucking and weather will influence the market through year's end.

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

Anjou pears are in strong production. Regular storage Bartletts are showing lighter color and shorter shelf life compared to recent weeks, with some shippers opening controlled atmosphere rooms. Bosc and Red pears remain in good supply.

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

Thunderstorms in Costa Rica are impacting growing regions through the end of October and into early November 2025, limiting pineapple supplies for the remainder of the year. Crownless pineapples remain in high demand. Expect substitutions, cancellations, and order changes. Mexican pineapples are available in limited supply, with overall quality and taste remaining good.

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



Potatoes

Harvest is now complete, and we have moved into storage crops. Supply is strong, and demand remains steady heading into the holiday pull. Burbank potatoes are gradually becoming available, with Norkoths as the primary variety. Washington potatoes are delivering excellent quality, with mid-size potatoes peaking; large and smaller counts remain tight. Color potatoes are also available. Trucking continues to influence the market. New-crop sweet potatoes are now available from North Carolina.

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



Squash

Mexico: Late rains limit Sonoran zucchini, keeping prices high; volume should rise in 10 days. Yellow squash may firm as production normalizes.
Georgia: Cooler nights slow harvests, but quality is excellent; limited Mexican zucchini keeps markets firm.
Florida: Central harvests just starting, with broader production in 1-2 weeks; markets remain elevated until full production ramps up.

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



Stone Fruit

Domestic peaches, plums, and nectarines have finished for the season. Imported peaches and nectarines are expected to arrive on both coasts around mid-December. Pomegranates, persimmons, and Asian pears will remain in good supply through October and November, while the domestic kiwi market stays steady with slightly lower prices.

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



Tomatoes

ALERT

Round: Eastern supplies light as VA/TN finish; Florida ramping with strong quality; Mexico moderate.
Roma: TN finishing; Florida rising with strong quality; Mexico improving but still light.
Grape: Eastern tapering; Florida gaining with excellent quality; Mexico steady.

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

High pressure and offshore flow will keep temperatures near to above average through the weekend. Wednesday morning lows will range from the low 40s to mid-50s, with daytime highs in the mid-70s to low-80s near the coast and low to upper 80s inland. Offshore winds weaken Thursday, allowing temperatures to cool closer to normal as the coastal marine layer rebuilds through the weekend.



MEXICO

Warm, seasonal temps will continue through the weekend, with slightly cooler mornings early in the week under high pressure. Highs will reach the low 70s to low 80s, and lows will range from the low 40s to low 50s through Friday, rising to upper 40s to mid-50s over the weekend. Aside from a sprinkle or two, mostly dry weather is expected through November 2nd.



FLORIDA

A slight chance of evening or nighttime sprinkles is expected across Northern and North-Central Florida Wednesday from a cold front. Cooler, drier air will follow late October, bringing cool mornings and gradually warmer daytime temperatures over the weekend.



ARIZONA

Low desert temperatures will run 5–10°F above normal through the weekend under a persistent high-pressure ridge. Highs will reach the upper 80s to mid-90s, with morning lows in the upper 50s to mid-60s. Moderate, gusty northerly winds continue through Wednesday afternoon, then ease to light and variable through Sunday.

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



Freight Updates

Freight this week sees several challenges. From Non-Domiciled CDL laws affecting driver availability, the Sikh Religious Holiday of Diwali also creating an active freight market. This is in addition to transition into winter growing regions and the near end of the Salinas growing season. Add in some rain and transition is officially upon us. Expect significant loading delays and the need for out of route pickups to fill trucks. This will be the pattern for the next three to four weeks as we approach Yuma. Don't forget that Pro*Fresh does LTL from both Salinas and Los Angeles, as well as cross docking and interstate transfers! So don't miss that Oxnard Berry pickup, send it to us and we can deliver to the region you are loading in! Ask Riddle for more on that.



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

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

	10/13/25	10/20/25	10/27/25	Change from	
				week ago	year ago
U.S.	3.665	3.620	3.718	↑ 0.098	↑ 0.145
East Coast (PADD1)	3.721	3.675	3.723	↑ 0.048	↑ 0.118
New England (PADD1A)	3.949	3.943	3.933	↓ -0.010	↑ 0.180
Central Atlantic (PADD1B)	3.877	3.878	3.881	↑ 0.003	↑ 0.077
Lower Atlantic (PADD1C)	3.639	3.578	3.642	↑ 0.064	↑ 0.126
Midwest (PADD2)	3.606	3.564	3.715	↑ 0.151	↑ 0.146
Gulf Coast (PADD3)	3.299	3.256	3.350	↑ 0.094	↑ 0.120
Rocky Mountain (PADD4)	3.658	3.585	3.686	↑ 0.101	↑ 0.031
West Coast (PADD5)	4.464	4.421	4.485	↑ 0.064	↑ 0.279
West Coast less California	4.052	4.008	4.095	↑ 0.087	↑ 0.304
California	4.940	4.898	4.934	↑ 0.036	↑ 0.252

*prices include all taxes

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



Crop Updates

Weather Relief Brings Some Stability, But Supply

Pressure Remains

We're finally catching a bit of a break weather-wise out West. Cooler nights and drier afternoons have helped ease some insect pressure and dry out fields that were hammered by nearly 1.5 inches of rain earlier this month. That said, the impact of those storms is still being felt across the board. Lighter weights, increased trimming, and quality concerns continue to affect many row crops as the Salinas season nears its end.

Romaine hearts remain extremely tight, and iceberg and green leaf are still showing issues with mildew, ribby frames, and seeder. Harvest crews are pushing through, but lower case weights and shelf-life concerns persist, especially in value-added packs. Spring mix and arugula supply has improved slightly, but growers remain limited to contract and planned volumes with little extra to offer.

On the brighter side, supplies of lettuce and leaf items from Mexico are picking up, crossing through South Texas with decent quality. This additional supply is helping soften demand pressure on the West Coast and keeping markets from climbing further. Huron is fully underway, providing a small bridge between Salinas and the desert. Quality and yields have been solid so far, but the region's volume is limited and won't be a long-term fix. We're still on track for the full transition to the desert growing region the week of November 17.

In citrus, California navels have officially kicked off with early sizing peaking on 72s and 88s. Valencia volume continues to taper off, and District 3 lemons are coming on stronger, with improving quality and supply.

Berry markets are still tight. Strawberries remain in a demand-exceeding supply situation, with yields improving slightly in Oxnard but still not enough to meet full demand. Central Mexico is slowly increasing production, but volumes remain light. Raspberry and blackberry supply is snug but showing signs of improvement, while blueberry availability continues to increase with steady Peruvian arrivals.

As always, we'll stay close to the field. Inconsistent supply and quality concerns will linger until we're fully transitioned to the desert. We don't expect to see major gaps, but it's a sensitive time in the season, and planning remains key.



JOEY PIEDIMONTE
SOURCING MANAGER