

The Source

Commodity of the Month - Grapes

MARKET ALERTS

Blueberries: Mexican imports remain light, while Georgia continues to face challenges from adverse weather. However, volume is expected to improve heading into the weekend. California production is projected to ramp up in the coming weeks.

Brussels Sprouts: The sprout market remains active, with supplies below normal and strong demand. Prices are high and steady, expected to remain so for at least another week.

Citrus (Lemons): Markets remain strong, with 140ct and smaller sizes tight. Small fruit will stay limited until District 2 ramps up in June. District 1 (San Joaquin Valley) is the primary region, while District 2 (Ventura/Oxnard) provides minimal volume.

Citrus (Oranges): Markets remain strong. The Navel season, now past its peak, will wrap up in June, with small fruit remaining limited. Suppliers are managing contracts and delaying the Valencia transition to ensure supply through the Fall. Valencia season is expected to ramp up in early June.

MAY 14, 2025

CROP UPDATES

Cooler temperatures and increased disease pressure are slowing growth in the Salinas Valley. Pest activity, especially aphids, has risen, with a lag in insect control before harvest. Field-packed products are more prone to insect and debris contamination, so washing before consumption is recommended. [Read more](#)

WEATHER

California: High pressure brings warmer temperatures today with winds gusting up to 30 mph. Morning lows will range from the 30s to 50s, and daytime highs will reach 58-85°F. A low-pressure system this weekend will cool temps, with coastal highs in the 50s-60s and inland highs in the 60s-70s.

Mexico: Expect warm temperatures through the weekend, with highs in the 80s-90s and lows in the 50s-60s. Dry weather through Saturday, with isolated showers and storms possible Sunday.

Florida: Warm, dry weather continues through the weekend with highs in the 80s-90s and lows in the 60s-70s. Winds gusting near 20 mph in SE Florida and Tampa Bay.

Arizona: Low desert temps return to normal by Friday with highs in the 80s-90s. Cooler weather arrives Sunday, with highs dropping to the 70s-80s.

IN PEAK SEASON



FREIGHT

DOT Blitz week happening now is challenging the trucking industry this week. We expect this to subside by Friday and will see better capacity into next week.

Table of Contents



[Apples](#)



[Citrus \(Grapefruit\)](#)



[Melon \(Cantaloupe\)](#)



[Asparagus](#)



[Citrus \(Lemon\)](#)



[Melon \(Honeydew\)](#)



[Avocados](#)



[Citrus \(Limes\)](#)



[Melon \(Watermelon\)](#)



[Bell Peppers](#)



[Citrus \(Oranges\)](#)



[Mushroom](#)



[Berries \(Blackberries\)](#)



[Cucumbers](#)



[Onions](#)



[Berries \(Blueberries\)](#)



[Eggplant](#)



[Pears](#)



[Berries \(Raspberries\)](#)



[Garlic](#)



[Pineapples](#)



[Berries \(Strawberries\)](#)



[Grapes \(Green/Red\)](#)



[Potatoes](#)



[Broccoli](#)



[Green Onions](#)



[Squash](#)



[Brussel Sprouts](#)



[Kale](#)



[Stone Fruit](#)



[Carrots](#)



[Lettuce Iceberg](#)



[Tomatoes](#)



[Cauliflower](#)



[Lettuce Leaf](#)



[Celery](#)



[Lettuce Tender Leaf](#)

Commodity Updates



Apples

The apple market remains steady, with prices holding firm—reflecting the longevity of both the product and its storage capabilities. Supplies are strong for foodservice sizes across most varieties. However, Honeycrisp and Cosmic Crisp remain limited, especially in smaller sizes. Some shippers are beginning to wrap up their Honeycrisp season.

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

Domestic supplies begin this week in Michigan, providing a boost to the supply chain amid strong demand in Washington. The market is expected to remain steady, supported by consistent production from Mexico and Peru.

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

Markets are stabilizing with more offshore fruit coming in on both coasts. Smaller sizes (48ct and below) are in a better position, while larger fruit remains tight. The normal crop has about 6-8 weeks left before Flora Loca takes over. California's season is now in full swing.

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

Florida is wrapping up, with Georgia just starting and light volume expected to increase. Western supplies from Nogales are winding down, while Coachella is showing strong quality and production. Overall volume is expected to rise as Georgia's harvest ramps up.

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

Supply Partners



Commodity Updates



Berries (Blackberries)

Blackberry availability has improved out of Mexico, driven by a decrease in quality rejections at the border. As a result, more transferred fruit is arriving in greater volume on the West Coast.

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

ALERT

Mexican imports remain light, while Georgia continues to face challenges from adverse weather. However, volume is expected to improve heading into the weekend. California production is projected to ramp up in the coming weeks.

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)

Improved volumes out of Central Mexico and Baja are beginning to ease the low availability and high markets experienced over the past two months. This positive trend is expected to continue into the summer.

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

Strawberry production is up across all growing regions. With the Mother's Day pull now behind us, markets have softened. Quality remains excellent out of Santa Maria, Salinas, and Watsonville, with promotable volumes readily available.

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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Commodity Updates



Broccoli

Broccoli quality remains excellent, with fields showing strong color and ideal sizing. The market is expected to remain steady heading into next week.

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



Brussel Sprouts

ALERT

The sprout market remains highly active, with industry-wide supplies well below normal and strong demand continuing. Open market prices are high and holding steady, a trend that is expected to persist for at least another week.

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



Carrots

Harvest in the Imperial Valley is going strong and will continue through this month before moving back to the Bakersfield area. Lake Park, GA is shipping good volume with chunks, cellos, jumbos, and babies, and will run through this month. 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)	Light	\$\$\$	Good



Cauliflower

Cauliflower quality remains strong, with fields showing excellent sizing and vibrant color. 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
Salinas, CA (May - Oct)	Steady	\$\$\$	Good



Celery

There will be good availability of all sizes throughout the week, with reports continuing to highlight strong quality and texture. Minimal seeder is being reported. Shippers will apply a delivery charge for loads outside Santa Maria/Oxnard, so direct loading in these areas will offer better cost efficiency.

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

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

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Commodity Updates



Citrus (Grapefruit)

Ruby Reds are currently available, with peak sizing at 40ct and larger. Shipments are coming out of both Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

ALERT

Markets remain strong, with 140ct and smaller sizes still tight. Shippers are closely monitoring numbers. Small fruit is expected to stay limited until District 2 ramps up around June. District 1 (San Joaquin Valley) remains the primary growing region, while District 2 (Ventura County/Oxnard) is providing minimal volume.

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)

The market is slightly down as rain led to early harvesting and increased supply. The crop is peaking on very small sizes (275/300ct), while larger sizes (110/150ct) remain limited and pricey. Rain may improve sizing, but larger fruit will take time to develop. Offshore fruit is also available.

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

ALERT

Markets remain strong across the board. The Navel season has passed its peak and is expected to wrap up in June, with small fruit remaining limited for the remainder of the season. Suppliers are monitoring Navel field projections to manage contracts, while shippers are keeping an eye on numbers. The goal is to maintain coverage while delaying the transition to Valencia oranges to ensure sufficient supply through the Fall. The Valencia season is expected to ramp up at the beginning of June.

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

Florida is nearly finished, while Georgia is showing good volume. More regional deals are expected as we move into summer. Nogales continues to have good availability, with production from Baja and Central Mexico on the rise. As Nogales winds down, Baja will take over as the main western region supplier.

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

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

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Commodity Updates



Eggplant

The market remains firm, with low availability in the East as Florida finishes and Georgia begins. Nogales is winding down, and California's desert region is now the primary supplier on the West Coast. Steady markets are expected, with gradual increases in volume.

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

Garlic quality remains excellent, and supplies are expected to stay strong in the coming weeks. Mexican peeled garlic will begin shipping on Monday, May 19th.

Commodity/Region	Supply	Price	Quality
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East Coast (Year Round)	Steady	\$\$\$	Good
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Bakersfield, California (Year Round)	Steady	\$\$\$	Good
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Gilroy, California (Year Round)	Steady	\$\$\$	Good
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Grapes (Green / Red)

The grape market is expected to stay relatively high until early June, when Mexico will have enough volume to push prices lower. Domestic grapes are expected to start in Coachella in the next few weeks, but with very light volume. Coachella's quick season will not have a significant impact on pricing. There is no expected gap between the end of the Chilean deal and the start of Mexico's supply.

Grapes (Green)

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

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

Green Onion supplies and quality continue to be good. Look for this market to stay steady going into the next week.

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

Kale supplies and quality remain strong this week, and this trend is expected to continue 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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Salinas, California (May - October)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Lettuce Iceberg

Excellent availability will continue throughout the week for this commodity. Aside from a few sporadic reports of bugs, overall quality remains good, with weights averaging 40-44 pounds per case. Seeder is minimal. Shippers are flexible, so promotions are encouraged. Production in Santa Maria remains moderate at best.

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

The market for romaine, as well as green and red leaf, remains steady. Shippers are flexible, so promoting is encouraged. Steady supplies of romaine hearts are expected throughout the week. There is little to no fringe or tip burn on all leaf items. Quality continues to be strong, with excellent sizing, weights, and overall texture.

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

All tender leaf lettuce varieties are in good supply and maintaining excellent quality overall. Fields are showing more consistent sizing, along with great texture and color. Supplies and quality are expected to remain strong going into the weekend.

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

The cantaloupe market remains strong, driven by recent retail ads. Mexican cantaloupes from Nogales are available, with improved sizing and availability. The domestic melon season has started slowly, with product peaking on larger sizes.

Commodity/Region	Supply	Price	Quality
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Central America (December - May)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Melon (Honeydew)

The honeydew market is strong, driven by recent retail ads. Mexican honeydews are available from Nogales, with improved sizing and availability. The domestic melon season has started slowly, with product peaking on larger sizes.

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

Domestic watermelons are now available from Florida, with California supplies expected to start in June. Mexican watermelons are increasing supply just in time for the Mother's Day pull. Suppliers are anticipating strong demand for the upcoming holidays, and volume deals are available.

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

Supplies and availability are excellent for both brown and white varieties.

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

PNW storage onions are nearly finished, with Texas crops ending this week and Mexican crossings continuing through July. Contracts are active for California and New Mexico onions in all three colors. LTL and FTL options are available, but truck availability is tight due to the holiday. Georgia offers all three colors, while jumbo white onions are limited and imported from other regions and Mexico.

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 ongoing limited supply. It is expected to stay largely unchanged until 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 smoother this week, with 8ct Crownless more readily available. While some substitutions may be needed for the remainder of the week, improvements are expected in the coming weeks.

Commodity/Region	Supply	Price	Quality
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Costa Rica (Year round)	Steady	\$\$\$	Fair
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Potatoes

The market is steady with stable pricing, and distributors prefer DLVD pricing. Deals are available as the storage crop winds down and new crop preparations begin in Eastern Idaho. Interest in California color potatoes is rising, and 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
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Pasco, Washington (August-July)	Steady	\$\$\$	Excellent
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Squash

Strong production is ongoing across all regions: Florida, Georgia, and Nogales. California is just beginning, with Selma and Santa Maria in production, and LA consolidation is available. Promotable volumes are widely available.

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

Domestic peaches, nectarines, apricots, and cherries have all started. Peaches are gaining volume daily, while nectarines are picking up speed. Apricots and cherries remain in very light supply, with high markets. Plums are expected to start by the end of the month.

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

The market is up slightly due to rain delays in the East and limited production. Georgia and Quincy are expected to start in early June, bridging to Tennessee in July. Sinaloa is winding down, while Baja and Central Mexico are ramping up. California production will begin in July.

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

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Weather Updates



CALIFORNIA

High pressure returns to the region today, bringing warmer temperatures, though winds will continue with gusts up to 30 mph. Morning lows will range from the mid 30s to low 40s south of King City, with mid 40s to low 50s elsewhere. Daytime highs will reach the upper 50s to low 70s near the coast, influenced by the marine layer, and low 70s to mid 80s further inland through Friday. A low-pressure system is expected to approach over the weekend, deepening the marine layer and cooling maximum temperatures to the mid 50s to mid 60s along the coast, with upper 60s to mid 70s inland.



MEXICO

Expect warm temperatures across the region through the weekend, with little change in the forecast. Mostly dry weather is expected through Saturday, with a chance for isolated showers and thunderstorms by Sunday. Highs will range from the mid 80s to mid 90s through Friday, and mostly in the low to upper 90s over the weekend. Lows will be in the mid 50s to mid 60s through Thursday morning, then rising to the low to upper 60s from Friday through Sunday morning.



FLORIDA

Expect warmer and drier weather through the weekend. Highs will range from the mid 80s to low 90s through Friday, and upper 80s to mid 90s over the weekend in most areas. Lows will be in the mid 60s to mid 70s each morning through Sunday. Winds will gust near or just below 20 mph across most of southeast Florida and the Tampa Bay area.



ARIZONA

Temperatures across the low deserts will return to seasonable norms by Thursday and Friday under a weak upper ridge of high pressure. On Thursday, highs will range from the low to upper 80s, with most fields warming to the low to mid 90s. Morning lows will inch up to the upper 50s to low 60s by Thursday morning. Increasing cloudiness ahead of the next upper-level trough will cool Saturday's high temperatures by several degrees, followed by more noticeable cooling on Sunday as a dry frontal boundary pushes in from the northwest. Sunday afternoon highs will only reach the mid 70s to low 80s.

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

Freight Updates



DOT Blitz week happening now is challenging the trucking industry this week. We expect this to subside by Friday and will see better capacity into next week.



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

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

	04/28/25	05/05/25	05/12/25	Change from	
				week ago	year ago
U.S.	3.514	3.497	3.476	↓ -0.021	↓ -0.372
East Coast (PADD1)	3.585	3.567	3.534	↓ -0.033	↓ -0.382
New England (PADD1A)	3.908	3.895	3.877	↓ -0.018	↓ -0.356
Central Atlantic (PADD1B)	3.806	3.796	3.777	↓ -0.019	↓ -0.378
Lower Atlantic (PADD1C)	3.470	3.448	3.408	↓ -0.040	↓ -0.386
Midwest (PADD2)	3.456	3.432	3.416	↓ -0.016	↓ -0.352
Gulf Coast (PADD3)	3.183	3.174	3.143	↓ -0.031	↓ -0.416
Rocky Mountain (PADD4)	3.470	3.460	3.463	↑ 0.003	↓ -0.328
West Coast (PADD5)	4.224	4.204	4.211	↑ 0.007	↓ -0.340
West Coast less California	3.777	3.750	3.735	↓ -0.015	↓ -0.318
California	4.740	4.728	4.760	↑ 0.032	↓ -0.363

*prices include all taxes

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

Crop Updates



The cooler temperatures along with a heavy marine layer and drizzle look to continue in the Salinas Valley as we move through May. The cooler temperatures continue to slow down growth rates while increasing mold, mildew and disease pressure in these stands. Some acreage in the valley is showing disease pressure impacting yields as growers disk some affected fields.

We have seen an uptick in pest activity in the fields recently, especially insect activity. Aphids, gnats and other small insects are being reported in some leafy green fields. Growers utilize integrated pest management techniques (IPM) to help control insects. When insect control is used there is a lag time between when the control is actively eliminating insects to when it has degraded and no longer present. This is when the crop can be harvested. Unfortunately, this lag time allows insects still present in the area to reenter the crop prior to harvest.

Insect pressure is generally more prevalent in field packed products. Field packed products are cut in the field and placed directly into a carton, brought to the facility for cooling and then shipped to customers. These fields are susceptible to winds, rain and insect pressure among other environmental factors during the growing season. Insects, dirt or dust and other field debris can accumulate in the product and may not be seen by the harvesting crew. There is no washing step involved and it is highly recommended that the customer wash the product before consuming.



TIM LYNCH

QUALITY ASSURANCE MANAGER