

The Source

Commodity of the Month - Citrus

MARKET ALERTS

Bell Peppers: Bell pepper supplies are tight from Florida freeze and Mexican weather; green bells scarce through March. Red bells slowly rise, quality moderate, markets steady, and prices remain high.

Broccoli: Broccoli supplies are tightening, with prices expected to rise into the weekend due to late-Nov/early-Dec planting gaps.

Carrots: Bakersfield harvest is nearly done; growers are moving into Imperial Valley. California carrot size and availability should improve in 2–4 weeks.

Citrus (Limes): Lime supplies are tight; Mexican prices near mid-\$60s. Peru and Colombia offer limited relief. High, volatile prices expected through March into April.

Citrus (Oranges): California Navels peak on 56/72ct; small sizes scarce through March. Use larger Navels or Cara Caras as substitutions. Markets elevated; advance orders recommended.

Cucumbers: Cucumber supplies are tight; Mexican output slows, Florida winter season ends, and Honduras offers limited contract/spot shipments, keeping markets firm.

Eggplants: Eggplant supply is mostly from Mexico as Florida winds down; availability adequate and markets steady.

Melon (watermelon): Watermelon prices remain high due to low yields and Mexican border issues; demand down slightly, focus shifting to offshore supply.

Pineapple: Pineapple market stable but tight; larger sizes rising late February. 6/7-crown up, 8-crown steady, crownless and organic limited.

Squash: Florida supply limited from February freeze; Nogales demand keeps prices high. Sinaloa crops shifting to Sonora; markets stay elevated.

Tomatoes: U.S. tomato supplies extremely limited; Florida frozen crops and reduced Mexican volumes keep markets tight through March.

Raspberries: Supplies out of CEMEX remain light, keeping markets elevated.

MARCH 4, 2026

CROP UPDATES

Last week's freeze in the Southeast caused major crop losses across multiple items. Bell peppers and tomatoes are especially tight, with Florida supplies minimal and Mexico helping fill gaps at higher prices. Corn, green beans, and carrots are also limited, with recovery not expected until April. Limes, melons, and pineapples remain firm due to reduced yields, weather issues, and strong demand. Southeast recovery is still weeks away, so Mexico is carrying more weight, but yields and logistics are unpredictable. Flexibility on size, grade, and origin will be key through March. [Read more](#)

WEATHER

California: Clouds and gusty winds Wednesday; lows 30s–50s, highs 60s–70s. High pressure returns Thursday, highs 60s–80s, lows 30s.

Mexico: Showers increase Wed–Thu (0.10–0.35 in), then isolate. Temps stay warm: highs 75–82°, lows 45–55°.

Florida: Isolated showers through the weekend (0.02–0.15 in). Temps: highs 78–88°, lows 58–70°. Winds 15–25 mph through Friday.

Arizona: Cooling Thu as a cold front drops highs to 68–75° and lows to 45–50°. Winds gust 20–25 mph Thu, easing Fri. Gradual warming weekend.

FREIGHT

Capacity out west, especially in Yuma, will continue to be tight as weather delays back east subside. We are seeing delays along the Mexican border, remnant of political issues that were causing delays in Mexico. Plan ahead and book in advanced when booking trucks this week.



IN PEAK SEASON

- Avocados
- Grapes
- Pears
- Oranges
- Potatoes

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Commodity Updates



Apples

The apple market continues to move upward at a measured but steady pace. This season has presented particular challenges for foodservice sizes, as crops across all varieties have skewed heavily toward larger fruit. Combined with reduced pack-outs and robust retail bag programs, this imbalance has tightened supplies and pushed pricing higher on smaller, lower-grade apples. These dynamics are expected to remain in place until the new crop becomes available.

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



Asparagus

Some suppliers are skipping Peruvian asparagus for Easter due to El Niño-driven quality concerns and mistimed volume. We will rely on Mexico (primarily Caborca) and transition to domestic supply from Washington, Idaho, and Michigan in mid-to-late April. Mexican production is well below normal and nearing decline ahead of holiday demand, keeping the market tight in 11lb packs through early April, with smaller sizes increasing and larger grades tapering off.

| Commodity/Region | Supply | Price | Quality |
|-------------------------|--------|--------|---------|
| Caborca (Year Round) | Light | \$\$\$ | Fair |
| Peru (Year Round) | Light | \$\$\$ | Fair |
| Mexico (November - May) | Light | \$\$\$ | Fair |



Avocados

Markets in Mexico have seen a slight increase. Peak sizes are 40/48 ct, with dry matter and oil content in the low 30s, delivering excellent flavor. Updates will be provided if conditions change.

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



Bell Peppers



Bell pepper supplies remain tight due to January's Florida freeze and challenging weather in Mexico. Green bells will be scarce through March, while Mexican production faces rain, pests, and limited top-grade fruit. With Coachella not starting until April, demand stays strong and prices high. Red bells from Mexico are gradually increasing, though some are shifted to green for better returns. Quality is moderate, Florida volumes are light, and markets are expected to stay steady this week.

| Commodity/Region | Supply | Price | Quality |
|--------------------------|--------|--------|---------|
| Florida (November - May) | Light | \$\$\$ | Poor |
| Mexico (November - May) | Light | \$\$\$ | Fair |

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

Supply Partners



Commodity Updates



Berries (Blackberries)

Supply out of CEMEX remains light, and California is still two to three weeks away from meaningful production.

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



Berries (Blueberries)

The market remains firm on this item, with elevated pricing expected to persist until production in California and the Pacific Northwest begins to ramp up in April.

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



Berries (Raspberries)



Supplies out of CEMEX remain light, keeping markets elevated.

| Commodity/Region | Supply | Price | Quality |
|-------------------------|--------|--------|---------|
| California (Year Round) | Light | \$\$\$ | Good |
| McAllen (October - May) | Light | \$\$\$ | Good |



Berries (Strawberries)

Production is increasing across all growing regions. CEMEX is nearly finished, while California, Baja, and Florida are ramping up under ideal weather conditions.

| Commodity/Region | Supply | Price | Quality |
|-----------------------------|--------|--------|---------|
| California (Year Round) | High | \$\$\$ | Fair |
| McAllen (November - May) | Light | \$\$\$ | Poor |
| Dover, Florida (Year Round) | Steady | \$\$\$ | Fair |

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

Supply Partners



Commodity Updates



Broccoli

ALERT

Broccoli supplies continue to tighten this week, with the stronger market reflecting reduced availability. Expect pricing to trend higher into the weekend as planting gaps from late November and early December rain events continue to impact production.

| Commodity/Region | Supply | Price | Quality |
|--------------------------------------|--------|--------|---------|
| Mexico (Year Round) | Steady | \$\$\$ | Good |
| Santa Maria, California (Year Round) | Light | \$\$\$ | Fair |
| Yuma, Arizona (November - May) | Light | \$\$\$ | Fair |



Brussel Sprouts

Brussels sprout quality and supplies continue to improve. The market is expected to remain steady with ample availability heading into next week.

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



Carrots

ALERT

Harvest in the Bakersfield region is nearly complete, with growers beginning a light transition into the Imperial Valley. Broader improvement across the California carrot industry is expected in the next 2-4 weeks. Entering fields too early will result in smaller sizing, but with a bit more time, size and overall availability should strengthen considerably.

| Commodity/Region | Supply | Price | Quality |
|--|--------|--------|-----------|
| Imperial Valley (February - May) | High | \$\$\$ | Excellent |
| Kern County (October - Feb) | Light | \$\$\$ | Good |
| Various Northwest Regions (July - October) | Steady | \$\$\$ | Good |



Cauliflower

Cauliflower supplies remain tight but are beginning to ease this week. 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 |
| Yuma, Arizona (November - May) | Light | \$\$\$ | Fair |



Celery

The market is softer overall; however, value-added items continue to see price escalation. All sizes are available, with better pricing coming from the Southern California region. A trend expected to continue throughout the season. Quality reports remain positive, with only minor seeding reported.

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

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

Supply Partners



Commodity Updates



Citrus (Grapefruit)

Star Ruby grapefruit are available, peaking at 48ct, and are being shipped from Riverside and the San Joaquin Valley.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|-------------------------|--------|--------|------|
| California (Year Round) | Steady | \$\$\$ | Good |
| Texas (October - April) | Light | \$\$\$ | Good |



Citrus (Lemons)

District 3 (CA Desert/AZ) has finished, leaving District 1 (San Joaquin Valley) as the primary growing region until District 2 (Oxnard/Ventura County) ramps up in late March to early April. District 1 is currently peaking in 140/165/115 counts.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|---------------------------------------|--------|--------|------|
| CA Desert/Yuma (October - February) | Steady | \$\$\$ | Good |
| Oxnard/Ventura (February - September) | Light | \$\$\$ | Fair |
| San Joaquin Valley (October - May) | Steady | \$\$\$ | Good |



Citrus (Limes)

ALERT

The lime market remains tight, with Mexican prices climbing toward mid-\$60s. Limited new-crop yields and January freeze losses constrain supply. Peru and Colombia help slightly but can't offset shortages. Volatile, elevated prices are expected through March and likely into April.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|-----------------------|-------|--------|------|
| Veracruz (Year Round) | Light | \$\$\$ | Good |
|-----------------------|-------|--------|------|



Citrus (Oranges)

ALERT

California Navel oranges are peaking on 56ct and 72ct, with small sizes (113ct/138ct) very limited through March. Flexibility with size and grade is needed, with larger Navels or Cara Caras as substitutions. Advance orders (4-5 days) are recommended, as same- or next-day orders depend on availability. Markets remain elevated on small and Choice/Fancy fruit; schools and DOD programs should consider 88ct or 72ct.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|---------------------------------|-------|--------|------|
| San Joaquin Valley (Year Round) | Light | \$\$\$ | Fair |
|---------------------------------|-------|--------|------|



Cucumber

ALERT

Cucumber supplies are tight as Mexican production declines and import volumes remain limited, keeping markets firm amid strong demand. Mexico: Sinaloa output is tapering ahead of the Sonora transition later this month, with lighter volume supporting higher prices. Florida: Winter production has ended; spring harvest is expected late March to early April. Honduras: Shipments are mostly contract-driven, with limited spot availability fetching premium prices due to scaled-back import programs.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|--------------------------|-------|--------|------|
| Florida (November - May) | Light | \$\$\$ | Good |
| Mexico (November - May) | Light | \$\$\$ | Good |

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

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Commodity Updates



Eggplant

ALERT

Eggplant supply is mostly from Mexico as Florida winds down after freeze damage. Availability is adequate and markets steady. Florida production is nearly finished; Mexico crossings support demand with minor price changes.

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



Garlic

The California garlic crop is progressing with good quality, supplemented by ongoing Mexican supplies.

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



Grapes

Green seedless supplies are tightening as Peru fades and Chile cannot fill the gap. Retail demand will drive the market, with greens remaining tight but available through April.

Grapes (Green)

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|--------|---------|
| | Steady | \$\$\$ | Good |

Grapes (Red)

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|--------|---------|
| | Steady | \$\$\$ | Good |



Green Onions

Green onion supplies remain very tight but are slowly easing from peak prices. Recent rain and cooler weather have lowered yields, and tight supplies are expected to continue into next week.

| Commodity/Region | Supply | Price | Quality |
|------------------------|--------|--------|---------|
| Mexico (Year Round) | Light | \$\$\$ | Fair |



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

Supply Partners



Commodity Updates



Lettuce Iceberg

Production this week is exceeding expectations. Despite warm weather in the Yuma region, multiple suppliers are reporting strong early-week numbers. Supplies may tighten later in the week, but shippers are currently flexible on volume orders. Lettuce pricing has eased, with good weights averaging 38-43 pounds and overall quality reported above average.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|--|-------|--------|------|
| Santa Maria, California (March-December) | Light | \$\$\$ | Fair |
|--|-------|--------|------|

| | | | |
|-------------------------------------|-------|--------|------|
| Salinas, California (May - October) | Light | \$\$\$ | Fair |
|-------------------------------------|-------|--------|------|



Lettuce Leaf

The market is steady for green and red leaf as well as romaine, with supplies expected to remain consistent throughout the week. Value-added romaine pricing is easing and should normalize within the next day or two. Overall quality is above average, with only minor tip and fringe burn reported, though warmer Yuma temperatures may increase this next week. Weights and lengths are reported as good across multiple shippers.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|-------------------------------------|--------|--------|------|
| Salinas, California (May - October) | Steady | \$\$\$ | Fair |
|-------------------------------------|--------|--------|------|



Lettuce Tender Leaf

Tender leaf items like spinach, cilantro, and arugula are now in good supply 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 |
|---------------------------------|--------|--------|------|

| | | | |
|--------------------------------|------|--------|------|
| Yuma, Arizona (November - May) | High | \$\$\$ | Good |
|--------------------------------|------|--------|------|



Melon (Cantaloupe)

Westside and Nogales deals are complete. Offshore cantaloupes are available in CA, TX, FL, and the Northeast, with pricing stabilized due to reduced demand from nationwide weather concerns. Retail promotions in March are expected to boost movement.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|----------------------------------|--------|--------|------|
| Central America (December - May) | Steady | \$\$\$ | Good |
|----------------------------------|--------|--------|------|

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

Supply Partners



Commodity Updates



Melon (Honeydew)

Offshore and Mexican honeydews are available but are expected to face challenges throughout March. Issues with plant viruses in Guatemala and Honduras have limited production, leaving Mexican honeydews to help supplement the market.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|--|--------|--------|------|
| Arizona (June-July) (October-November) | Steady | \$\$\$ | Good |
|--|--------|--------|------|



Melon (Watermelon)



Lower yields and Mexican border issues have kept watermelon prices elevated. Cooler national temperatures have slightly reduced demand, but limited Mexican crossings are shifting focus to offshore watermelons.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|--|--------|--------|------|
| Arizona (June-July) (October-November) | Steady | \$\$\$ | Good |
|--|--------|--------|------|



Mushroom

Supplies and availability are excellent.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|------------|------|--------|-----------|
| Nationwide | High | \$\$\$ | Excellent |
|------------|------|--------|-----------|



Onions

Onions are available from WA, ID, and UT. Demand has slowed this week due to nationwide weather concerns. Yellow and red onion pricing remains steady, while white onions are rising. Transportation continues to influence the market. Mexican and U.S. TX onions are now available.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|--|-------|--------|-----------|
| Eastern Orgeon/Parma, ID (August - April) | High | \$\$\$ | Excellent |
| San Joaquin Valley (May - August) | Light | \$\$\$ | Good |
| Tri-Cities, Washington (July - April) | High | \$\$\$ | Good |



Pears

The pear market is starting to strengthen as Anjou, Bosc, and Red pear production aligns with improving demand. Bartletts are winding down for the season, and foodservice sizes are tightening compared to recent weeks.

| Commodity/Region | Supply | Price | Quality |
|------------------|--------|-------|---------|
|------------------|--------|-------|---------|

| | | | |
|--|--------|--------|------|
| | Steady | \$\$\$ | Good |
|--|--------|--------|------|

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

Supply Partners



Commodity Updates



Pineapples

ALERT

The pineapple market is stable but remains tight due to earlier rain and planting gaps, with contracts maintaining priority. Larger sizes are expected to gradually increase by the end of February. Currently, 6- and 7-crown counts are up, 8-crown counts are steady, and 8- and 10-crownless remain tight. Organic pineapples are also limited.

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



Potatoes

Supply and demand are good, with sheds actively making deals. Smaller counts are tightening. Burbank potatoes are now available, with Norkoths as the main variety. WA potatoes are high quality, peaking on mid sizes, while large and small counts remain limited. FL color potatoes are available, and trucking continues to influence the market.

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



Squash

ALERT

Florida supply is limited due to February freeze damage, with a rebound expected in 2-3 weeks. Strong demand for Nogales fruit is keeping prices high, particularly for yellow varieties, which are more weather-sensitive. Crops are transitioning from Sinaloa to Sonora, and markets are expected to remain elevated for several weeks.

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



Stone Fruit

Imported nectarines are nearly finished, while peaches have 3-4 more weeks. Plums will be available into April. A few domestic kiwis are still shipping from California, supplemented by imports from Greece and Italy to keep the market steady. Domestic Asian pears from California will continue for a couple more weeks.

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



Tomatoes

ALERT

U.S. tomato supplies remain extremely limited, particularly for romas and rounds. Late-January sub-freezing temperatures in Florida continue to suppress domestic production, with relief not expected until early April. Mexican volumes, typically a key supplement, are lighter than usual due to prior weather damage, compounded this week by unrest, roadblocks, and shipping delays. Tight supplies and market pressure are expected to continue through March.

| Commodity/Region | Supply | Price | Quality |
|-----------------------------|--------|--------|---------|
| Mexico (Year Round) | Light | \$\$\$ | Fair |
| Florida (November - May) | Light | \$\$\$ | Fair |

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

Supply Partners



Weather Updates



CALIFORNIA

A low passing to the north Wednesday will increase cloudiness and bring gusty winds up to 30 mph. Morning lows will range from the upper 30s to low 40s south of King City and mid 40s to low 50s elsewhere, with daytime highs in the low 60s to low 70s. High pressure returns Thursday, dropping overnight lows to the low-mid 30s south of King City through the weekend, while daytime highs climb to the upper 60s to low 80s by Sunday.



MEXICO

Shower activity will increase Wednesday into Thursday, with rainfall totals of 0.10–0.35 inches across most areas, and higher isolated amounts possible in storms or higher terrain. Showers become more isolated later in the week. Temperatures remain warm through Sunday, with highs in the mid-70s to low-80s and lows in the mid-40s to mid-50s.



FLORIDA

Showers will remain isolated through the weekend, with rainfall totals of 0.02–0.15 inches per event. Temperatures stay warm, with highs in the upper 70s to mid-80s Wednesday, then mostly low-upper 80s Thursday through Sunday. Lows will be upper 50s to mid-60s in Northern Florida and low 60s to near 70 in Central and Southern Florida. Winds gust 15–25 mph through Friday.



ARIZONA

Little change is expected Wednesday, but a dry cold front brings noticeable cooling Thursday afternoon. Highs drop from mid-80s–low 90s Wednesday to upper 60s–mid 70s in most valleys by Friday, with morning lows falling from mid-50s Wednesday to mid-upper 40s Friday. Light southerly winds Wednesday shift northwest Thursday, gusting 20–25 mph, then weaken Friday. Gradual warming returns over the weekend.

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

Freight Updates



Capacity out west, especially in Yuma, will continue to be tight as weather delays back east subside. We are seeing delays along the Mexican border, remnant of political issues that were causing delays in Mexico. Plan ahead and book in advanced when booking trucks this week.



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

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

| | 02/16/26 | 02/23/26 | 03/02/26 | Change from | | |
|----------------------------|----------|----------|----------|-------------|----------|----------|
| | | | | 2 year ago | year ago | week ago |
| U.S. | 3.711 | 3.809 | 3.897 | ▼ -0.125 | ▲ 0.262 | ▲ 0.088 |
| East Coast (PADD1) | 3.763 | 3.843 | 3.924 | ▼ -0.227 | ▲ 0.182 | ▲ 0.081 |
| New England (PADD1A) | 4.215 | 4.201 | 4.314 | ▲ 0.018 | ▲ 0.277 | ▲ 0.113 |
| Central Atlantic (PADD1B) | 4.030 | 4.104 | 4.122 | ▼ -0.189 | ▲ 0.196 | ▲ 0.018 |
| Lower Atlantic (PADD1C) | 3.612 | 3.708 | 3.808 | ▼ -0.269 | ▲ 0.165 | ▲ 0.100 |
| Midwest (PADD2) | 3.664 | 3.798 | 3.888 | ▼ -0.031 | ▲ 0.337 | ▲ 0.090 |
| Gulf Coast (PADD3) | 3.412 | 3.489 | 3.598 | ▼ -0.133 | ▲ 0.255 | ▲ 0.109 |
| Rocky Mountain (PADD4) | 3.607 | 3.683 | 3.737 | ▼ -0.269 | ▲ 0.259 | ▲ 0.054 |
| West Coast (PADD5) | 4.383 | 4.465 | 4.534 | ▼ -0.119 | ▲ 0.231 | ▲ 0.069 |
| West Coast less California | 3.970 | 4.050 | 4.138 | ▼ -0.014 | ▲ 0.309 | ▲ 0.088 |
| California | 4.860 | 4.944 | 4.990 | ▼ -0.238 | ▲ 0.140 | ▲ 0.046 |

*prices include all taxes

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

Crop Updates



Seeing the Freeze Up Close

I spent last week in Orlando for SEPC, and it was nice connecting with many of you out there. While I was in Florida, I got a firsthand look at what the late January freeze did to crops in the region and the impact is more significant than the reports suggested.

Bell peppers took a serious hit. Fields that should be loaded are thin, and what's coming out is inconsistent. Strawberry plants looked structurally sound, but the ratio of flowers to fruit told the real story. There's more bloom than berry right now, which means volume is still weeks away.

That freeze is still echoing across the supply chain.

Bell peppers are tightening, particularly greens. Significant freeze losses in Florida have resulted in lower yields and more off-grade fruit expected this spring.

Western Mexico volumes crossing through Nogales are rising and helping fill the gap, but prices are climbing as demand grows. Red bells are relying heavily on Mexico, where Culiacán is producing moderate volume with good quality and better yields ahead. Central Mexico crossings remain steady but limited, and Florida supply is minimal. Markets will stay firm short-term.

Tomatoes remain the headline. Southeast supplies are extremely limited after growers invoked Force Majeure due to crop loss. Domestic production won't recover until mid-April at the earliest. Mexico is helping cover the gap, but yields are lighter and quality at pack-out has been mixed. Recent logistics disruptions have stressed the supply chain. Rounds, romas, and grape tomatoes are all tight. Expect elevated pricing through the next six weeks, and consider substituting rounds for romas where possible.

Corn took a beating. Bi-color, white, and yellow corn in the Southeast are all impacted. On the West Coast, bi-color and white are limited, and yellow is extremely tight. Recovery isn't expected until new crop arrives in early April.



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Crop Updates



Green beans are in a similar spot. The freeze caused significant yield loss and irregular harvests in the Southeast. Mexico is providing relief out of Sinaloa, though cooler temperatures have slowed development. Guatemala is contributing modest volume with good quality, but lead times are longer. Expect firm markets through at least mid-March.

Carrots are tightening as California transitions from the San Joaquin Valley to the Imperial Valley. Weather-related issues and reduced yields are limiting availability through March. Arizona and Georgia are helping fill gaps, but commodity jumbo packs remain snug and pricing is elevated.

Limes continue to climb. Reduced new crop volume out of Mexico due to bloom drop, heat, and humidity is limiting pack-outs and driving prices higher. Colombia is providing a more consistent alternative with better shelf life, but offshore supply isn't enough to cover demand. Expect volatility through March and possibly into early April.

Melons are in seasonal transition. Offshore cantaloupes remain sufficient, though cooler weather is shifting sizing toward 9- and 12-count fruit. Honeydews have been significantly impacted by lower temperatures and downy mildew. Yields are declining, and 8-count fruit is extremely limited. Western Mexico is helping offset offshore tightness, with steady supplies expected through late May.

Pineapples remain firm. Costa Rican supply continues to face strong demand and limited availability due to recent thunderstorms and ongoing planting gaps. Crownless and organic fruit are especially tight. The market is expected to stay elevated through mid-April.

The common thread this week is timing. Southeast recovery is still weeks away. Mexico is carrying more weight than usual, but yields aren't heavy and logistics remain unpredictable. As we move deeper into March, flexibility on size, grade, and origin will be critical. We'll keep watching conditions and provide updates as the situation evolves.



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