

The Source

Commodity of the Month - Lemons

MARKET ALERTS

Brussel Sprouts: Brussels sprout supplies are very limited, with insect pressure, decay, and small sizing in Salinas and Oxnard.

Carrots: Southern San Joaquin carrot harvests delayed; supplies tight 6-8 weeks. Cello/jumbo may run out soon; baby/value-added still available. Prices rising; 72-hour lead time recommended.

Celery: Oxnard/Santa Maria supplies improving; Yuma light. Value-added items rising; normal production resumes early February.

Citrus (Oranges): California Navel favor larger sizes; small fruit is tight. Size flexibility and advance orders are needed, with elevated markets on Choice/Fancy and small sizes.

Grapes: Domestic grape supplies are nearly gone; imports are high-priced, keeping markets elevated until mid-January arrivals help stabilize FOBs.

Green Onion: Supplies are very tight, keeping the market high into next week.

Melon (honeydew): Offshore and Mexican honeydews are available; offshore prices high, Mexican supplies limited during the regional transition.

Pineapple: Pineapple market stabilizing but tight on 8/10-count crownless and organic fruit; expect substitutions and holiday port delays through 2025.

IN PEAK SEASON

- Apples
- Pears
- Avocados
- Potatoes
- Oranges

JANUARY 7, 2026

CROP UPDATES

Small citrus remains tight, with California Navel skewed toward larger sizes and limited small fruit. Weather-related stress caused fruit drop and quality issues, also impacting lemons and mandarins. Flavor is good, but sizing is the challenge. Flexibility, substitutions, and planning ahead are essential, with Florida, Mexico, and Texas helping fill gaps. Constraints are expected through the Valencia season. [Read more](#)

WEATHER

California: Gusty winds and cool temps Wednesday-Thursday, then colder nights and warming days into the weekend.

Mexico: Seasonal temps through Saturday, cooler Sunday; mostly dry with lows 40s-50s and highs 70s-80s, dropping Sunday.

Florida: Warm and dry through Saturday, cooler Sunday with light northern Florida showers; winds under 20 mph.

Arizona: Low-pressure system brings light showers to southern Arizona Wednesday; up to $\frac{1}{4}$ " in Yuma/central AZ, trace elsewhere.

FREIGHT

Freight this week still sees some leftover effects of year end, 2025 with driver availability being tight in some loading regions. Markets are still active, elevated across the US, and speaking to Yuma, specifically, we could likely see demand for trucks continue until transition back to Salinas. Be advised that this week, Inter-California trucks are tight especially from Yuma to regions such as Los Angeles, Salinas and the central valley.

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LOGISTICS



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Commodity Updates



Apples

Foodservice-size Gala and Granny Smith apples remain in tight supply, with prices edging slightly higher. Other varieties are more readily available, and pricing across those markets remains steady.

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

Mexican asparagus demand weakened as rising Mexican production and Peruvian imports oversupplied the market, keeping prices flat. Warm weather is boosting Mexican volumes and extending seasons, while Peru shipments remain steady but are beginning to taper. Overall demand is soft, with little improvement expected until late January or early February.

Commodity/Region	Supply	Price	Quality
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Ciudad Obregon (Year Round)	Light	\$\$\$	Fair
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Peru (Year Round)	Light	\$\$\$	Fair
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Mexico (November - May)	Light	\$\$\$	Fair
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Avocados

Markets are steady at lower levels with ample fruit on the trees and softer demand. Harvesting in Mexico will be minimal this week due to the holiday, and the impact on the market remains to be seen. Aventajada is the primary crop shipping, with peak sizes at 48s and 60s and dry matter/oil content in the high 20s to low 30s.

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

Green bell supplies have tightened this week as availability decreases in the growing regions. Red bell supplies are gradually improving, with more product expected to cross in the coming weeks.

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

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Commodity Updates



Berries (Blackberries)

Ample supplies combined with soft demand are keeping this item readily available from both Texas and California.



Berries (Blueberries)

We are experiencing a brief supply gap as Chilean offshore fruit awaits release at the ports, while Central Mexican production remains limited due to weather conditions.



Berries (Raspberries)

Production out of Central Mexico is down due to inclement weather, and markets are firming across all distribution points.



Berries (Strawberries)

Markets are firming across all regions as demand improves and retail ad pricing resets. California rain has shifted additional demand to Texas and Florida, while Central Mexico remains the primary growing area and is shipping product west to support coverage. The volume deals seen in recent weeks are becoming less frequent.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Steady	\$\$\$	Fair
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Commodity/Region	Supply	Price	Quality
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California (Year Round)	Light	\$\$\$	Excellent
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Dover, Florida (Year Round)	Light	\$\$\$	Excellent
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McAllen, Texas (Year Round)	Light	\$\$\$	Excellent
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Commodity/Region	Supply	Price	Quality
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California (Year Round)	Light	\$\$\$	Good
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McAllen (October - May)	Steady	\$\$\$	Good
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Commodity/Region	Supply	Price	Quality
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California (Year Round)	Light	\$\$\$	Fair
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McAllen (November - May)	Steady	\$\$\$	Good
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Dover, Florida (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 supplies are improving across all regions, and the market is expected to gradually ease lower heading into next week.



Brussel Sprouts



Brussels sprout supplies remain extremely limited, with the Salinas Valley and Oxnard regions continuing to face insect pressure, some decay, and smaller sizing.



Carrots



Southern San Joaquin carrot harvests have been delayed by wet weather, with fields saturated from recent rain and harvests not expected until the weekend, weather permitting. Supplies are tight and expected to remain so for 6-8 weeks until the Imperial Valley harvest begins in mid-late February. Cello and jumbo carrots may run out by Thursday, while baby carrots and value-added items remain available. Pricing is rising, and a minimum 72-hour lead time is recommended; early orders and flexibility are essential.



Cauliflower

Cauliflower supplies are strong across all sizes and regions, with the market expected to remain steady into next week.



Celery



Supplies in the Oxnard and Santa Maria regions have improved slightly, with rain expected to clear for the rest of the week. Yuma production remains light but will continue with a few shippers. Value-added items will see price increases this week, with shippers monitoring averages. Normal production is expected to resume in early February.

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

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

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

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

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

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

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Commodity Updates



Citrus (Grapefruit)

Red Rios are currently available, peaking at 48ct, and are being shipped from both Riverside and the San Joaquin Valley.



Citrus (Lemons)

Markets are improving as increased harvests from District 1 (San Joaquin Valley) boost overall supply. District 3 (CA Desert/AZ) remains the primary growing region, with peak sizes at 140ct, 115ct, and 165ct. Mexican fruit is also available, so contact us for South Texas loads.



Citrus (Limes)

Lime markets are firm as the current crop winds down and No. 1 fruit tightens. Prices are expected to rise through January and possibly February, with sizing shifting from larger to smaller fruit and some risk of transit defects due to weather.



Citrus (Oranges)

ALERT

California Navel oranges are skewed toward larger sizes, peaking on 56ct and 72ct, while small sizes (113ct, 138ct) remain very limited and tight through the season into Valencias. Flexibility on size and grade will be needed, with substitutions to larger Navel or Cara Caras likely. Advance orders (4-5 days) are strongly recommended, as same- or next-day orders depend on availability. Expect elevated markets on Choice/Fancy grades and small fruit.



Cucumber

Mexican supplies are steady with good overall quality. Holiday-related transportation challenges are causing short-term disruptions, while eastern supplies remain limited as offshore Honduran shipments begin.

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

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

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

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

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

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

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Commodity Updates



Eggplant

East Coast supplies are tightening due to cooler weather in South Florida. Mexican volumes are gradually increasing, though sizing remains mixed during the transition. Overall quality is good, with smaller fruit more common than 24-count cartons.



Garlic

The California garlic crop is progressing well with good quality, complemented by steady Mexican supplies.



Grapes

ALERT

Domestic supplies are nearly gone as imports begin arriving on both coasts. Imported red and green grapes are priced well above the final domestic lots, keeping the market elevated through the first three weeks of January. Increased mid-January arrivals should help FOBs return to more typical seasonal levels.



Green Onions

ALERT

Green onion supplies remain very tight due to recent rains reducing yields. The market is expected to stay elevated into next week.



Kale

Kale supplies and quality remain strong, with similar conditions expected into next week.

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

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

Grapes (Green)

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

Yuma production has picked up, and shippers are adjusting accordingly. Promote this commodity aggressively. Overall quality is good, with weights ranging 39–44 pounds and minimal seeder or misshapen heads reported. Supplies are expected to remain steady for at least the next few weeks.



Lettuce Leaf

Romaine, green leaf, and red leaf production is strong this week, with butter lettuce also picking up. Romaine hearts are expected to remain steady, so promote aggressively. Weather is favorable through next week, and quality on all leaf items is reported above average. Value-added pricing remains unchanged.



Lettuce Tender Leaf

Supplies and quality of tender leaf items continue to improve, with similar conditions expected to continue as favorable weather persists.



Melon (Cantaloupe)

ALERT

Westside and Nogales deals are complete. Offshore cantaloupes are available in CA, TX, FL, and the Northeast, with pricing stabilized due to steady demand.

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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Commodity/Region	Supply	Price	Quality
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Salinas, California (May - October)	Steady	\$\$\$	Fair
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Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Light	\$\$\$	Good
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Oxnard, California (Year Round)	Light	\$\$\$	Fair
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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)

ALERT

Offshore and Mexican honeydews are available. Offshore prices are elevated due to vessel delays and lower yields, while Mexican supplies are limited as the crop transitions from Northern to Southern Mexico.



Melon (Watermelon)

Domestic watermelons are finished. Mexican watermelons from Nogales are supplying the Midwest and East Coast, with limited availability from both Texas and Nogales. Offshore watermelons are also available in limited supply.



Mushroom

Strong availability across all areas.



Onions

Onions are currently available from WA, ID, and UT, with demand remaining strong across the U.S. Yellow and red onions are holding steady in price, while whites are trending higher. Market movement is largely influenced by transportation factors.



Pears

The pear market is moving smoothly, with Anjous, Bartletts, Bosc's, and Reds arriving on schedule and in solid supply. Production is strong, foodservice sizes are plentiful, and pears are currently offering better promotional value than large apples—something even apples can't help but notice.

Commodity/Region	Supply	Price	Quality
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Arizona (June-July) (October-November)	Steady	\$\$\$	Good
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Commodity/Region	Supply	Price	Quality
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Arizona (June-July) (October-November)	Steady	\$\$\$	Good
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Commodity/Region	Supply	Price	Quality
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Nationwide	Light	\$\$\$	Good
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Commodity/Region	Supply	Price	Quality
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Eastern Oregon/Parma, ID (August - April)	High	\$\$\$	Excellent
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San Joaquin Valley (May - August)	Light	\$\$\$	Good
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Tri-Cities, Washington (July - April)	High	\$\$\$	Good
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Commodity/Region	Supply	Price	Quality
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Hood River, Oregon (August-July)	Light	\$\$\$	Good
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Yakima, Washington (August-July)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High



Commodity Updates



Pineapples

ALERT

The pineapple market is beginning to stabilize but remains tight on 8- and 10-count crownless pineapples, as well as organic fruit. Expect substitutions, cancellations, and order adjustments for these items. Holiday-related port delays are likely through the remainder of 2025.



Potatoes

Supplies and demand are strong, with sheds actively making deals. Smaller counts are becoming harder to find. Burbanks are now available, with Norkoths as the main variety. Washington potatoes are producing excellent quality, peaking on mid sizes, while large and small counts remain tight. Color potatoes are available. Trucking continues to influence the market. New crop sweet potatoes from CA and NC are also available.



Squash

Florida supplies are moderate, with new fields helping offset the winter slowdown. Zucchini supplies have tightened as older Sinaloa fields wind down, while yellow squash remains steady with good quality.



Stone Fruit

Pomegranates, persimmons, and pineapple quince are finished for the season, while domestic Asian pears remain available. The domestic kiwi market stays steady at higher prices, and imported kiwi are now arriving. Imported peaches and nectarines have also started landing on both coasts in limited quantities.



Tomatoes

Roma Tomatoes: Florida supplies are limited due to weather, but sizing and volume are expected to improve from Florida and Mexico over the next 7-10 days. **Round Tomatoes:** Supplies remain light due to slow maturity, though warmer weather should boost harvests and availability within 7-10 days. **Grape Tomatoes:** Florida volume is winding down, while Mexico continues to provide steady supplies with good overall quality.

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

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

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

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

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

Despite drier conditions, a slowly exiting low will bring gusty onshore winds and near- to slightly below-average temperatures Wednesday and Thursday. Morning lows will range from the low-upper 30s south of King City to the upper 30s-low 50s elsewhere, with daytime highs in the mid 50s-low 60s. As high pressure builds and shifts winds offshore Thursday night, overnight lows will drop to the mid 20s-low 30s south of Soledad and mid 30s-mid 40s elsewhere through the weekend, while daytime highs gradually warm into the low-upper 60s.



MEXICO

Seasonal temperatures are expected through Saturday, with cooler conditions Sunday as dry northerly winds move into the region. Early morning lows will range from the low 40s to low 50s through Saturday, dropping to the mid 30s-mid 40s Sunday. Afternoon highs will be mostly in the low 70s to near 80 Wednesday through Saturday, falling to the upper 50s-upper 60s on Sunday. Dry weather is forecast over the next five days, with only a chance of a sprinkle or isolated light shower.



FLORIDA

Warm and dry conditions are expected through Saturday, with cooler temperatures arriving Sunday. A few light showers are possible over Northern Florida this weekend. Winds will generally gust up to 20 mph or less through Friday across most of Southeast Florida and the Tampa Bay area.



ARIZONA

A low-pressure system moving across northern Baja will bring scattered showers to southern Arizona by Wednesday noon. The Imperial Valley may receive a few hundredths of an inch of rain, with eastern Coachella Valley seeing a trace. Yuma and central Arizona could pick up just under $\frac{1}{4}$ inch by sunset.

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



Freight Updates

Freight this week still sees some leftover effects of year end, 2025 with driver availability being tight in some loading regions. Markets are still active, elevated across the US, and speaking to Yuma, specifically, we could likely see demand for trucks continue until transition back to Salinas. Be advised that this week, Inter-California trucks are tight especially from Yuma to regions such as Los Angeles, Salinas and the central valley.



U.S. On-Highway Diesel Fuel Prices*(dollars per gallon)						full history XLS
	12/22/25	12/29/25	01/05/26	Change from		
				week ago	year ago	
U.S.	3.544	3.500	3.477	-0.023	-0.084	
East Coast (PADD1)	3.674	3.645	3.630	-0.015	-0.004	
New England (PADD1A)	4.047	4.035	4.024	-0.011	0.253	
Central Atlantic (PADD1B)	3.892	3.875	3.872	-0.003	0.071	
Lower Atlantic (PADD1C)	3.557	3.522	3.502	-0.020	-0.057	
Midwest (PADD2)	3.483	3.424	3.387	-0.037	-0.143	
Gulf Coast (PADD3)	3.214	3.184	3.172	-0.012	-0.097	
Rocky Mountain (PADD4)	3.304	3.233	3.222	-0.011	-0.208	
West Coast (PADD5)	4.205	4.156	4.128	-0.028	-0.019	
West Coast less California	3.766	3.719	3.683	-0.036	-0.056	
California	4.711	4.660	4.641	-0.019	0.023	

*prices include all taxes

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



Crop Updates

The Small Citrus Squeeze

Small citrus is going to be a challenge for the rest of this season, and it's not likely to correct itself any time soon. The California Navel crop continues to skew heavily toward larger sizes, with production peaking on 56- and 72-count fruit. Small sizes, particularly 88-, 113-, and 138-count, remain extremely limited and are expected to stay tight through the balance of the Navel season and into the transition to Valencias.

The weather in California's Central Valley has been the main driver behind this size profile. Earlier in the season, citrus trees experienced a prolonged growth pause after nearly a month of limited sunlight, misty mornings, and cool daytime temperatures. That combination put trees under stress, leading to noticeable fruit drop across multiple varieties. In some groves, growers estimate losses of 30 to 40 percent before harvest volumes had a chance to build.

That stress was followed by record rainfall and then a quick shift back to sunny, warmer conditions. Those swings are now showing up in the form of quality challenges that are difficult to detect at harvest. Issues like clear rot, puffing, and creasing are becoming more common, which means additional fruit is being sorted out during packing. Even where groves appear full, pack outs are much lighter than expected, and small fruit simply is not there. Small Navels are the tightest and will remain the most difficult to source. Lemons are also seeing pressure, especially on larger sizes, as earlier weather slowed growth. Mandarins have been particularly affected by fruit drop, further tightening availability in that segment.

Navel oranges are consistently testing in the 12 to 13 Brix range, and the eating quality has been excellent. This is not a flavor issue as much as it's a sizing issue. To maintain coverage, flexibility will be critical. Larger-size Navels will continue to be more available, and Cara Cara oranges can help bridge gaps when available. Mandarins may also be an option depending on timing and programs.

Florida fruit will continue to play a supporting role in the market, particularly as sizing profiles differ from those in California. Mexico and Texas will also provide additional options, but none fully replace the availability of California small Navels.

Planning remains important. Orders placed with additional lead time will have the best chance of being filled as requested. As suppliers manage tight size distributions, substitutions will become more common.

Looking ahead, the current size profile is expected to persist through the Navel season and into Valencias. Small fruit will remain the most constrained part of the citrus front, and flexibility on size and variety will be key to navigating the months ahead.



**JOEY PIEDIMONTE
SOURCING MANAGER**