

The Source

Commodity of the Month - Citrus



MARKET ALERTS

Avocado: Markets remain elevated due to tight supply and holiday-related delays. Mexico's harvest has resumed, and supply should stabilize soon. Smaller sizes dominate, with larger ones priced higher. Pre-ordering is advised.

Strawberries: Cold temperatures are impacting strawberry production in Central Mexico, Baja, Oxnard, and Florida. Central Mexico is expected to see increased volumes, and ongoing wildfires in Los Angeles may lead shippers to direct shipments further east.

Limes: Prices are rising as the current crop cycle ends and the new crop begins with limited large sizes. February's new crop is expected to shift to smaller sizes, with offshore supplies helping to stabilize availability.

Grapes(Green/Red): Imported grapes will be limited through February, with delayed harvests in Chile and Peru. Green seedless volume will rise in late January, easing prices, while red seedless demand will keep the market active.

Cantaloupe: Offshore melon supply remains tight due to lower yields in Guatemala, port delays, and Tropical Storm Sara. This has led to limited availability and potential quality issues. Triggered pricing is in effect and expected to continue through weeks 8-9. Mexican cantaloupes from Nogales are also extremely limited.

Honeydew: Prices are high due to limited supply, with Mexican volumes being scarce and most product peaking in larger sizes.

JANUARY 15, 2025

CROP UPDATES

Cold weather is causing delays in lettuce harvesting, but supplies remain abundant. The avocado market is tight, with availability improving slowly. Melon supplies are limited, especially honeydew, which will remain scarce through February. Seedless watermelon supply is better, with stability expected by March. [Read more](#)

WEATHER

Arizona -High temperatures in low deserts will rise through Friday, reaching upper 60s to mid-70s. Moderate to severe lettuce icing in Yuma and daily lows in Central Arizona.

California - Santa Ana winds will end this morning with gusts of 25 mph, with light offshore winds persisting through the weekend. Lows range from the low 30s to upper 40s, with highs reaching mid 60s to 70s. Temperatures will rise to upper 30s to 40s.

Florida -Northern Florida may experience cool mornings with light frost, but temperatures will warm over the weekend. Moderate to heavy rainfall is expected, with lighter amounts in southern Florida.

Mexico - The region is expected to experience near-normal temperatures and dry weather through January 19th, with highs in the low 70s to 80s and lows in the low to upper 40s.

FREIGHT

Post holiday markets sees drivers still on vacation and lack of trucks in most growing areas, especially Idaho and the Pacific Northwest. Yuma and the Southern California growing regions are in full swing, which are reducing load times and helping to expedite trucks.



MARKET ALERTS

Pears: Pears remain in tight supply until mid-July, with Bartletts winding down by February. Anjou pears are the main variety and will see price increases throughout the year.

Squash: Older Sonora crops are still available, but newer Sinaloa crops show better quality. As older crops phase out, supply has tightened, and cold weather in Florida is expected to reduce production, driving up market prices.

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Commodity Updates



Apples

The apple market is expected to remain mostly steady throughout January, with one exception: Honeycrisp apples. This variety is down approximately 38% from last year, and prices are expected to continue rising. Overall, the size profile of the Washington crop is skewing toward larger apples, limiting the availability of smaller foodservice sizes, especially in Granny Smith and Fuji varieties.

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



Asparagus

Asparagus supplies are beginning to improve this week, with better production out of Caborca despite ongoing cold temperatures. Once the weather warms, production is expected to increase significantly, further easing market prices. Peruvian volumes remain limited due to rain and heat affecting quality. Cold weather across the country has slowed market activity, even with reduced production levels.

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



Avocados



Markets remain elevated due to limited harvest after the holiday break, resulting in tight supply and industry-wide allocations. Mexico resumed normal harvesting this week, and the supply pipeline should stabilize within the next week. As this happens, markets will likely adjust. The size structure continues to peak at 60ct and smaller, with 48ct and larger priced higher. Please send orders with ample lead time to assist with ripening and inventory planning.

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



Bell Peppers

Red and yellow pepper supplies from Mexico are improving, while orange peppers remain limited. Warmer weather is expected to increase overall volumes. Florida's green peppers are experiencing minor quality challenges, whereas Mexico continues to deliver strong volumes with excellent quality.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

Good volume is arriving from Central Mexico into the US, and markets are expected to remain steady through the end of the week.

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



Berries (Blueberries)

The Peruvian season is winding down, with Chile stepping in to fill the gap. Cold weather in Central Mexico is slowing production. While the overall market remains steady, prices are firming up across all regions.

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



Berries (Raspberries)

This item varies from shipper to shipper, with some reporting higher volumes while others are maintaining steady production. The majority of available supply is coming from Central Mexico, while Baja is producing steady, but lighter volumes.

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



Berries (Strawberries)

ALERT

Strawberry production is being impacted across all regions, including Central Mexico, Baja, Oxnard, and Florida, due to cold temperatures. However, Central Mexico is expected to see increased volumes heading into the weekend. Additionally, due to ongoing wildfires in Los Angeles, more shippers may choose to direct shipments further east to address storage and warehouse challenges in the area.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Good
McAllen, TX (November - May)	Steady	\$\$\$	Good
Dover, FL	Light	\$\$\$	Good

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

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Driscoll's
Only the Finest Berries™



PRO*ACT

Commodity Updates



Broccoli

Supplies remain strong and steady; however, colder temperatures may slow production. As demand picks up, the market is likely to strengthen. For now, expect the market to remain stable this week.

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



Brussel Sprouts

Demand remains steady, and the market outlook is stable. Domestic production is winding down, while new crop volumes from Mexico are slightly delayed but expected to improve by the week of January 20. Although there are no immediate supply concerns, pre-booking is highly recommended.

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



Carrots

Harvest is ongoing in the Bakersfield area and will continue through February before moving to the Imperial Valley, where the outlook remains positive. Grimmway's Lake Park, GA production is set to ramp up in the last week of January. Please remember to submit snack pack orders 48 hours in advance.

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



Cauliflower

Cauliflower supplies and quality are excellent this week. The market remains low and is expected to stay steady into next week.

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



Celery

The market for this commodity remains firm. Availability in Yuma is moderate to light, while Southern California sees moderate supplies. Larger sizes continue to be in the shortest supply. Escalated pricing on value-added items and contracts will persist through the week. Quality remains consistently good across both regions.

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

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

Key Partners



Commodity Updates



Citrus (Grapefruit)

Star Rubies are available, with peak sizes in the 56ct and smaller ranges, shipping from both Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

Markets remain steady overall. District 3 (CA Desert/AZ) is performing well and will continue through February. District 1 (San Joaquin Valley) has started off light but is expected to ramp up in the coming weeks.

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



Citrus (Limes)



Prices are increasing as the current crop cycle winds down and the new crop begins with limited availability of larger sizes. February's new crop is expected to shift toward smaller sizes (230/250ct). Offshore supplies may help stabilize availability.

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



Citrus (Oranges)

Peak sizes remain at 138ct and 113ct, with markets showing a slight increase but still remaining aggressive for these sizes. As the season progresses, we expect the peak sizing to shift towards 113ct and 88ct. Brix levels are in the 13 range, making this a strong year for foodservice.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (Year Round)	High	\$\$\$	Excellent



Cucumber

Nogales is experiencing moderate supply with good quality, while Florida is facing shortages due to cold weather. Imports from Honduras are limited, with mixed quality. Markets are expected to improve moderately in the coming weeks.

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

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

Key Partners **Sunkist** FRESH LINK

Commodity Updates



Eggplant

Florida and Nogales are seeing strong supplies and high-quality produce. Market conditions remain stable, with promotional opportunities anticipated.

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



Garlic

Garlic quality is excellent, and supplies are expected to remain robust in the coming weeks.

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)



Imported grapes will remain in limited supply through February, with harvests in both Chile and southern Peru running 2-3 weeks behind schedule. Green seedless volume is expected to rise in late January, potentially easing prices gradually. However, red seedless production will increase more slowly, with stronger demand, keeping the red market active into mid-February.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green Onion supplies remain strong with good quality for the next couple of weeks. Expect the market to stay steady as we approach the weekend.

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



Kale

Kale supplies are expected to remain plentiful this week, with good quality continuing into next week.

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

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

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Commodity Updates



Lettuce Iceberg

Steady supplies are anticipated in Yuma for this commodity throughout the week. However, cooler weather in the growing regions could slow production next week. Shippers are currently offering flexibility. Weights remain consistent at 39-43 pounds across multiple suppliers. While some slight misshapen heads have been noted, overall quality remains good. Pricing is expected to stay competitive throughout the week.

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



Lettuce Leaf

Cool weather in the Yuma region has tightened production of romaine, green leaf, and red leaf lettuces, resulting in a stronger market to start the week. Romaine heart production is expected to be moderate at best. Commonly reported defects include slight fringe and tip burn. However, the length and sizing of all leaf items remain favorable, and overall quality continues to be above average.

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



Lettuce Tender Leaf

All tender leaf items are in good supply and quality this week, with steady market conditions expected to continue into next week.

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



Melon (Cantaloupe)

ALERT

Offshore melon supply remains tight, with demand exceeding available supply. Lower yields in Guatemala, combined with ongoing port delays, have intensified market pressures. Tropical Storm Sara has further reduced yields, creating challenges for growers in meeting commitments. The melon market is experiencing very limited availability, and quality could be impacted by extended shipping times. Triggered pricing has been implemented on certain items and is expected to persist through weeks 8-9. Mexican cantaloupes from Nogales are also extremely limited.

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

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

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Commodity Updates



Melon (Honeydew)

ALERT

Honeydew prices are elevated due to limited supply. Mexican volumes are scarce, with the majority of the product peaking in larger sizes.

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



Melon (Watermelon)

Watermelon supply is on the rise, resulting in a softer market. Post-holiday demand remains low, and this downward trend is expected to persist. Florida offshore supplies are available, and Mexican watermelons are peaking in larger sizes.

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



Mushroom

Supplies are plentiful and of excellent quality, making them ideal for promotions.

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



Onions

Post-holiday demand remains strong, and supply chain challenges are returning to normal. Storage crop quality is excellent, with a good overall supply of Red and Yellow Onions. However, medium-sized Red Onions are in tight supply, while Jumbo Red and Jumbo Yellow Onions are readily 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

ALERT

Pears remain in tight supply and are expected to stay that way until mid-July when California's new crop of Bartletts arrives. The Washington crop is down 25-50% depending on location and variety, with Bartletts winding down by February. Bosc volumes have seen the greatest decline and will be in high demand until the new crop. Anjou pears are the primary variety available and will experience steady price increases throughout the year.

Commodity/Region	Supply	Price	Quality
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

The pineapple market is experiencing strong demand for Costa Rican pineapples, with contracted business taking priority. As a result, suppliers are concentrating on securing new 2025 contracts. Pineapple availability is expected to remain limited until mid-April due to lower yields from heavier rainfall. Crownless pineapples continue to be a key focus, though they remain in limited supply.

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



Potatoes

The potato market is expected to remain steady, with stable FOB pricing, although DLVD pricing is experiencing fluctuations due to logistical challenges. A winter front in the Pacific Northwest has caused some disruptions in pricing. Red and Yellow potatoes have seen price increases driven by demand and availability. Additionally, February is Idaho Potato Lovers Month, and promotional deals are available for this occasion.

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



Squash

ALERT

Older Sonora crops are still available, but newer Sinaloa crops are showing better quality. However, supply has tightened as older crops phase out. Additionally, cold weather in Florida is expected to reduce production, contributing to an increase in market prices.

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



Stone Fruit

Imported peaches, plums, and nectarines are now arriving on both coasts in light supply, with volumes expected to increase as the month progresses. Domestic Asian pears are nearing the end of their season, with imported varieties expected to start in about three weeks. Domestic kiwi is shipping in good volume, although the market has seen a slight increase.

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



Tomatoes

Florida production is increasing, though recent cold weather may slow growth. Sinaloa Roma production is starting slowly but is expected to improve next week, while volumes from Baja and Eastern Mexico are decreasing. Grape tomato production is rising in Culiacán, with promotable volumes now available. Availability is also coming from Nogales, McAllen, and Florida.

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

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

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FRESH LINK



Weather Updates



CALIFORNIA

The Santa Ana winds will wrap up this morning with gusts up to 25 mph, though light offshore winds will persist through the weekend. Morning lows will range from the low 30s to upper 40s, with daytime highs reaching the mid 60s to mid 70s. An upper low will pass late Friday into Saturday, increasing cloud cover and bringing a slight chance of rain to Orange and San Diego counties. Minimum temperatures will rise to the upper 30s to upper 40s, while maximum temperatures will drop to the mid 50s to low 60s. Skies will clear slowly on Sunday, with a return to cooler minimum temperatures Sunday night.



MEXICO

Little change is expected across the region through January 19th, with near-normal temperatures and dry weather prevailing through the weekend. Highs will range from the low 70s to low 80s in most growing areas, while lows will be in the low to upper 40s through Sunday morning. As a result, the risk of frost will remain low during this period.



FLORIDA

Cool mornings with light, patchy frost possible across northern Florida through Friday morning. Temperatures will warm over the weekend, ending the frost risk. While dry weather will dominate initially, northern and central Florida could experience moderate to heavy rainfall by the weekend, with lighter amounts expected in southern Florida. Winds will gust between 15 to 25 mph across much of southern Florida over the next three days.



ARIZONA

Afternoon high temperatures across most of the low deserts will rise through Friday, reaching the upper 60s to mid-70s in most fields. However, morning lows will have limited recovery. Moderate to severe lettuce icing is expected to persist across Yuma through the weekend. Central Arizona, as well as Coachella and Imperial Valley, will experience daily lows in the mid 30s to low 40s.

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

Freight Updates



Post holiday markets sees drivers still on vacation and lack of trucks in most growing areas, especially Idaho and the Pacific Northwest. Yuma and the Southern California growing regions are in full swing, which are reducing load times and helping to expedite trucks.



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

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

	12/30/24	01/06/25	01/13/25	Change from	
				week ago	year ago
U.S.	3.503	3.561	3.602	↑ 0.041	↓ -0.261
East Coast (PADD1)	3.587	3.634	3.718	↑ 0.084	↓ -0.274
New England (PADD1A)	3.753	3.771	3.821	↑ 0.050	↓ -0.475
Central Atlantic (PADD1B)	3.774	3.801	3.876	↑ 0.075	↓ -0.373
Lower Atlantic (PADD1C)	3.501	3.559	3.649	↑ 0.090	↓ -0.216
Midwest (PADD2)	3.469	3.530	3.532	↑ 0.002	↓ -0.197
Gulf Coast (PADD3)	3.196	3.269	3.321	↑ 0.052	↓ -0.271
Rocky Mountain (PADD4)	3.370	3.430	3.399	↓ -0.031	↓ -0.356
West Coast (PADD5)	4.110	4.147	4.213	↑ 0.066	↓ -0.363
West Coast less California	3.705	3.739	3.776	↑ 0.037	↓ -0.307
California	4.576	4.618	4.716	↑ 0.098	↓ -0.426

*prices include all taxes

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

Crop Updates



The coldest week of the winter growing season is underway in the Arizona-California desert. Lettuce ice is causing harvesting and loading delays. While current quality remains strong across many commodities, conditions such as blistering, epidermal peeling, and slower growth are expected to increase in February.

Despite repeated lettuce ice events in the Arizona-California desert growing region, supplies of green leaf, iceberg, and romaine remain abundant. Harvesters trim back defective outer layers, resulting in lower case weights but excellent quality.

Demand remains weak post-holiday, and pricing is still steady at lower levels. We expect markets to pick up as continued cold weather and ice events impact production.

The avocado market remains in a demand-exceeds-supply situation. Mexican harvests resumed last week but have yet to stabilize the supply pipeline fully, and we are still experiencing size and grade substitutions. Markets are elevated, with allocations industry-wide. Supply should begin to normalize in the coming weeks, but tight conditions will persist in the short term leading up to the Super Bowl.

The melon market remains fragile. Although cantaloupe availability has slightly improved, supplies remain limited. Current arrivals show good external quality with strong netting. Honeydews faces the tightest supply conditions, with demand far exceeding supply. Flexibility in sizing may be necessary to receive allocations on orders. Honeydew shortages will likely persist well into February. Seedless watermelons are in much better supply, and we recommend substituting until the market can stabilize in early March when second-cycle production in Guatemala begins.



JOEY PIEDIMONTE
SOURCING MANAGER