

# The Source

Commodity of the Month - Lemons



## MARKET ALERTS

**Cauliflower:** Production in Yuma is starting slowly, with fair quality and some reports of mildew and slight discoloration. Supplies are extremely limited and are expected to stay tight into next week.

**Cantaloupe:** Offshore melons are impacted by reduced yields from Tropical Storm Sara, leading suppliers to focus on contracted business. The market is tight with limited availability, and triggered pricing is in effect through December. Relief from Honduras and Costa Rica is expected late December or early next year. Quality remains excellent with minimal cosmetic issues, while Mexican melons from Nogales are limited in size and availability.

**Honeydew:** Prices are elevated due to limited supply, with reduced yields from November's Tropical Storm Sara. Additional offshore supplies are expected by the end of the month, but are not yet on the water. Mexican honeydew volume remains very limited.

## DECEMBER 11, 2024

## CROP UPDATES

Warmer temperatures improved growth in Southwestern crops, but supplies are still limited. A cold front mid-week will bring freezing temperatures, causing lettuce icing, blistering, and smaller sizes. This will slow growth, reduce yields, and impact quality, especially for tender greens, while delayed harvests will further limit supply. [Read more](#)

## WEATHER

**Arizona** - Lows in Yuma Co. fields are expected to be freezing or near-freezing, with lettuce icing expected. Lows in Southeast California and central Arizona will be slow to recover.

**California** - Morning lows will drop to low 30s to 40s, with daytime highs ranging from mid 60s to low 70s. Light rain may occur through Thursday night, with highs cooling to upper 50s to mid 60s. Total rainfall is expected to reach ¼".

**Florida** - A cold front is expected to bring rainfall totals of 0.75-1.50 inches to the Florida Panhandle, 0.30-1.60 inches across Northern Florida, 0.10-1.35 inches to Central Florida, and less than 0.10 inches to Southern Florida.

**Mexico** - A cold front is forecasted to bring below-normal temperatures and frost on Thursday, with warming expected by Friday. No rain for five days, with lows in the mid-40s to mid-50s.

## FREIGHT

This week truck capacity is very tight from the Idaho region. Advanced bookings are highly encouraged. West coast sees some delays in Yuma due to lettuce ice. Expect extended wait times for field packed items. Advanced planning for Christmas to new Year is underway. Expect a spike in the truck market during that time.



## IN PEAK SEASON



Save  
the Date!



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2025

APRIL 14 - 16, 2025  
MONTEREY, CA

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# Commodity Updates



## Apples

The apple market is expected to remain steady throughout December. Smaller foodservice sizes will continue to be limited across most varieties, as packouts are primarily peaking on larger sizes. This trend is most pronounced in Granny Smith and Fuji apples. However, with schools out for the holidays, lighter demand should help stabilize prices.

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



## Asparagus

Mexican supplies remain limited due to colder weather and are expected to stay tight until mid-January when Caborca production begins. While Peruvian volume has improved, warmer weather has slowed production and caused some quality issues. Markets on both coasts are likely to remain slightly elevated this week.

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



## Avocados

Markets remain steady, with a size curve favoring small fruit while larger sizes remain tight. Pricing is lower for small fruit and stronger for larger sizes. As the season progresses and harvests shift to higher elevations, the size curve is expected to improve. Strong supplies from Mexico are anticipated through year-end, providing excellent opportunities to promote small fruit.

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



## Bell Peppers

Markets remain elevated but have slightly softened as we transition on both coasts. Coachella will conclude this week, while Nogales supplies are gradually increasing, with fruit peaking on small to medium sizes. South Florida volume is slowly rising. California desert will have red availability through the end of December, while Nogales will steadily ramp up over the next three weeks as California winds down.

Commodity/Region	Supply	Price	Quality
California (May - October)	Light	\$\$\$	Good
Florida (November - May)	Light	\$\$\$	Fair
Georgia (May - June)	Light	\$\$\$	Fair

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

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# Commodity Updates



## Berries (Blackberries)

Good volumes are arriving in the U.S. from Baja and Central Mexico, with product being distributed to key distribution points on both the West and East Coasts. The market is expected to remain firm heading into next week.

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



## Berries (Blueberries)

Peak volumes are coming in from Central Mexico, Peru, and Baja, keeping markets soft as many shippers work to move product. Key loading hubs include Central California, Florida, and New Jersey.

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



## Berries (Raspberries)

Numbers remain steady with most shippers. Some larger shippers are actively looking to move additional volume, while others are meeting their targets and maintaining a steady pace.

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



## Berries (Strawberries)

Demand is exceeding supply across all loading locations, including California, Baja, Central Mexico, and Florida. Baja has just started harvesting minimal volumes, and Florida is only beginning production. Significant increases in supply are not expected until late December.

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

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

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# Commodity Updates



## Broccoli

Broccoli supplies have improved this week, with overall excellent quality. The market is expected to remain steady heading into the weekend.

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



## Brussel Sprouts

Demand remains relatively strong despite a slight softening in open market FOBs over the past week. A market rebound is anticipated within the next 1-2 weeks.

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 for the Fall season, which will continue until February. Due to 60 days of 100+ degree weather this past summer, growers are anticipating a tight Fall season. Allocations may be necessary as sizing is expected to be smaller than usual.

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 production in Yuma is off to a very slow start. Overall quality is fair, with reports of some mildew and slight discoloration. Supplies are extremely limited and are expected to remain tight into next week.

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



## Celery

Demand has decreased, leading to a softer market. Production in Yuma is anticipated to start around Christmas, while Oxnard and Santa Maria continue harvesting. Overall quality remains good, though supplies of larger sizes have tightened. All value-added products for this commodity are now off escalation.

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

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

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# Commodity Updates



## Citrus (Grapefruit)

Desert Rios are available, with peak sizes in 56ct and smaller, shipping from 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, while District 1 (San Joaquin Valley) has started slowly and is expected to ramp up in the next few weeks.

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



## Citrus (Limes)

Lime prices remain stable with flat demand. Fruit is peaking on 110/150 sizes, showing improved quality. The market for smaller sizes is higher and will remain limited over the next few weeks.

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



## Citrus (Oranges)

Navel oranges are performing well, with peak sizes at 138ct, 113ct, and 88ct. While the market for 138ct is currently low, it is expected to stabilize soon. As the season progresses, peak sizing will shift to 113ct and 88ct. Sizes 72ct and larger will remain tight for the foreseeable future. Gas times are around 24 hours, and Brix levels are in the 12-13 range, making it a great year for foodservice. Domestic mandarins have also started.

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



## Cucumber

Eastern production has yet to fully recover from recent hurricanes, leading to higher market prices, limited supply, and quality issues. Offshore Honduran imports have started, but in light volumes. Nogales is seeing moderate supply as it transitions from Sonora to Sinaloa. With holiday demand starting this weekend, prices are expected to rise.

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

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

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# Commodity Updates



## Eggplant

South Florida and Nogales crossings are both on the rise, with quality improving. Both regions are reporting excellent volumes, with promotable quantities available.

Commodity/Region	Supply	Price	Quality
California (May - October)	Steady	\$\$\$	Good
Florida	Light	\$\$\$	Fair



## Garlic

Garlic quality is excellent, with supplies expected to remain strong in the weeks ahead.

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)

Some domestic red seedless grapes are expected to remain available in California through the week of the 16th, while domestic greens, blacks, and red globes have concluded for the season. Imported reds and greens are arriving on both coasts, but volumes are lighter than anticipated. Greens will face demand-exceeds conditions until early January, and the spot market for reds will remain tight. The situation is expected to improve in the second half of January, with adequate supplies anticipated by February.

### Grapes (Green)

Commodity/Region	Supply	Price	Quality
Mexico (May - June)	Steady	\$\$\$	Excellent

### Grapes (Red)

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



## Green Onions

Green onion supplies and quality remain strong, with the market expected to stay steady through the weekend.

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



## Kale

Kale continues to exhibit excellent quality, with all varieties showing strong sizing and texture. Currently, no issues have been reported. However, this may change due to the cold mornings expected in Yuma this 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

Supplies in Yuma remain above average, boosted by the warm weather in recent weeks, which has increased production. Many suppliers are offering flexibility on volume orders, making this a great time to promote. Quality has been good, with weights averaging 40-44 pounds across multiple suppliers. All value-added items for this commodity are off escalation.

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



## Lettuce Leaf

Romaine, green, and red leaf will have strong availability throughout the week in Yuma. All escalations on value-added products for leaf items have been removed. Quality remains good, with consistent sizing and weights. Romaine heart production is moderate at best, but many suppliers are offering flexibility, making this an excellent time to promote.

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



## Lettuce Tender Leaf

With colder weather in the Yuma growing region, quality defects are expected in the coming weeks. Discoloration, weak texture, and blistering may affect tender leaf items. Supplies are likely to tighten over the next couple of weeks.

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



## Melon (Cantaloupe)



Offshore melons are impacted, with suppliers focusing on contracted business. Tropical Storm Sara has reduced yields, tightening the market with limited melons available. Triggered pricing is in effect through December. Relief from Honduras and Costa Rica is expected late December or early next year. Quality remains excellent with minimal cosmetic issues, while Mexican fruit from Nogales is limited in sizing and availability.

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. November's Tropical Storm Sara impacted fields and infrastructure, reducing yields. Additional offshore honeydew supplies are expected by the end of the month, but are not yet on the water. Mexican volume remains very limited.

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



## Melon (Watermelon)

Watermelon supplies are extremely limited as production in Northern Mexico winds down and Southern Mexico has just begun. East Coast and Georgia suppliers have been significantly impacted by Hurricane Milton, shifting demand to the West Coast. Offshore watermelons are expected to be available in January through various ports.

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



## Mushroom

Supplies are increasing now that the holiday demand has passed, with promotable volumes expected to be available in January.

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



## Onions

Storage quality remains excellent, with sizing trending toward jumbos. Strong export demand is driving up prices, and whites are very tight. Markets are firm and expected to stay that way until the next holiday. Lighter supplies in ID/OR are expected, while WA suppliers improve.

Commodity/Region	Supply	Price	Quality
Eastern Oregon/Parma, ID (August - April)	High	\$\$\$	Excellent
San Joaquin Valley (May - August)	Light	\$\$\$	Good
Tri-Cities, Washington (July - April)	High	\$\$\$	Good



## Pears

All major pear varieties are currently being packed in Washington. This year will be tight for pears, with the Washington crop significantly smaller than last year's volumes. The market remains firm and is expected to stay that way throughout the year. Bartlett pears are currently a better value than Anjou, but this advantage will only last until Bartletts wrap up near the end of January.

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

Suppliers are maintaining 6-week averages and focusing on contracted business as they prepare for 2025 contracts. Costa Rican pineapple supplies are improving, with better quality expected after rainfall. Larger fruit is scarce, but Mexican pineapples are more available with improved quality.

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



## Potatoes

The ID market is steady with strong availability and good quality as we approach the holiday. Inclement weather in the PNW is limiting truck supply, expected to decline through year-end. We recommend extra lead time for orders. Shippers are pulling from storage for smaller potatoes, and sweet potato yields in NC are down year-over-year.

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



## Squash

Markets are softer, with strong overall supplies of both green and yellow varieties in Florida and Nogales. Promotable volumes are available.

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



## Stone Fruit

Imported peaches and nectarines are expected to arrive on both coasts during the week of 12/16, with light supplies primarily consisting of medium-sized volume fills. Asian pears are in good supply, with domestic availability expected through January. Domestic kiwi continues to ship in strong volumes, and the market remains steady.

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



## Tomatoes

Demand is exceeding supply, with new crop production soon to cross into Nogales and McAllen. Prices remain high across all varieties, with relief not expected until early January. Light supplies of grape and roma tomatoes are expected to cross in late December, with rounds arriving the first week of January. In the meantime, active markets are anticipated with the holidays approaching.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair
Baja California (Spring/Summer - NOV)	Light	\$\$\$	Good
Florida (November - May)	Light	\$\$\$	Fair

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

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# Weather Updates



## CALIFORNIA

As winds subside, morning lows will drop to the low 30s to low 40s inland and the low 40s to low 50s near the coast. Daytime highs will range from the mid 60s to low 70s. A low pressure system will move in tonight, bringing a slight chance of light rain through Thursday night. Highs will cool to the upper 50s to mid 60s as it passes. Friday will be dry before another system arrives Saturday with another chance of rain. Total rainfall through Sunday is expected to reach up to ¼”.



## MEXICO

A cold front will bring below-normal temperatures and possible frost on Thursday morning, with warming expected by Friday. No rain is forecast for the next five days. Lows will range from the mid 40s to mid 50s today, mid 30s to mid 40s Thursday morning, and low 40s to low 50s over the weekend. Daytime highs will be in the mid 60s to low 70s today, warming to the low 70s to low 80s through Sunday.



## FLORIDA

A cold front will move through the region today, bringing rainfall totals of 0.75” to 1.50” to the Florida Panhandle, 0.30” to 0.60” across much of Northern Florida, 0.10” to 0.35” to Central Florida, and near or less than 0.10” to Southern Florida.



## ARIZONA

Decreasing winds, clear skies, and a cold air mass will bring freezing or near-freezing lows to most Yuma Co. fields, with widespread lettuce icing expected. Southeast California and central Arizona will see lows in the mid 30s to low 40s, with slow recovery into the weekend. Highs will range from the mid 60s to low 70s through Friday, warming to the mid 70s by the weekend.

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

# Freight Updates



This week truck capacity is very tight from the Idaho region. Advanced bookings are highly encouraged. West coast sees some delays in Yuma due to lettuce ice. Expect extended wait times for field packed items. Advanced planning for Christmas to new Year is underway. Expect a spike in the truck market during that time.



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

[full history](#) XLS

	11/25/24	12/02/24	12/09/24	Change from	
				week ago	year ago
U.S.	3.539	3.540	3.458	▼ -0.082	▼ -0.529
East Coast (PADD1)	3.593	3.597	3.535	▼ -0.062	▼ -0.515
New England (PADD1A)	3.776	3.773	3.755	▼ -0.018	▼ -0.663
Central Atlantic (PADD1B)	3.787	3.793	3.750	▼ -0.043	▼ -0.656
Lower Atlantic (PADD1C)	3.503	3.507	3.432	▼ -0.075	▼ -0.448
Midwest (PADD2)	3.531	3.521	3.425	▼ -0.096	▼ -0.475
Gulf Coast (PADD3)	3.203	3.227	3.130	▼ -0.097	▼ -0.510
Rocky Mountain (PADD4)	3.450	3.431	3.329	▼ -0.102	▼ -0.720
West Coast (PADD5)	4.177	4.164	4.119	▼ -0.045	▼ -0.683
West Coast less California	3.755	3.739	3.682	▼ -0.057	▼ -0.628
California	4.662	4.652	4.623	▼ -0.029	▼ -0.744

\*prices include all taxes

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

# Crop Updates



Warmer temperatures following the Thanksgiving Holiday in the Southwestern desert growing regions have helped overall growth rates and quality in many of the current crops. Coupled with light post-holiday demand leafy green fields have been able to increase in size and internal structure. Iceberg and romaine heads are showing better densities and less high core/seeder along with generally good quality and improved yields. Supplies are improving but not yet abundant across the board as we move through December.



A change in the weather is forecast from mid-week into the weekend as a very cold air mass moves into the region. Morning temperatures in the low to mid 30s will bring near freezing temperatures with widespread lettuce ice impacting many upcoming crops. The Southwestern Desert regions have seen some cold mornings and lettuce ice before the Holiday with some epidermal peel and blister showing up in some of the leafy green supplies. This round of cold temperatures is expected to be much colder and more widespread than previous cold temperatures. While blister and epidermal peel will certainly impact quality in many leafy green stands the overall extended cold temperatures will also slow overall growth rates of all crops in the region. Along with blister and epidermal peel you can expect to see lighter color and carton weights and smaller head size as growers trim out damaged outer leaves. The tender spinach and spring mix items will also take a hit with the expected cold temperatures impacting yields, texture and shelf life of these products.

Another factor with the cold morning temperatures is the delayed harvest start times as crews must wait until crops warm up before harvesting can begin. With limited daylight hours already during the winter, crews will have less time to conduct harvesting activities. This will in turn limit the overall product coming into the coolers and available for loading. Overall lesser weights, yields, quality, condition, textures and shelf life are anticipated in these upcoming harvests.



**TIM LYNCH**

**QUALITY ASSURANCE MANAGER**