

The Source

Commodity of the Month - Lemons



MARKET ALERTS

Asparagus: Production from Peru and Mexico is limited due to cold temperatures in Mexico and heat-related quality issues in Peru, with markets on both coasts expected to remain high for the next month.

Cantaloupe: Offshore melons are in limited supply due to vessel delays, holiday port schedules, and Tropical Storm Sara, with triggered pricing expected through December. Relief from Honduras and Costa Rica is not expected until 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 from Tropical Storm Sara's impact on fields, with additional offshore supplies expected later in the month. Mexican volume is very limited, and larger honeydews are peaking in size.

DECEMBER 24, 2024

CROP UPDATES

Melon supplies are limited due to reduced yields from Tropical Storm Sara and a virus in Guatemala, with increased demand and port delays driving prices higher. Relief is not expected until January, and a potential port strike could worsen the shortage. [Read more](#)

WEATHER

Arizona - Warm temperatures will continue through Tuesday, with highs in the 70s to low 80s, cooling to the 60s and 70s by Thursday, while morning lows drop from the upper 30s to mid 40s, reaching the upper 20s to mid 30s by Thursday.

California - Showers may linger Monday morning, with clearing before more rain arrives Monday night, and cooler temperatures through the week, with totals of ½" to 1" through Tuesday and additional rain expected Wednesday through Friday.

Florida - Shower activity will increase by midweek as a cold front stalls over the state, with rain totals between 0.02" and 0.20", and a slight chance of morning frost in northern Florida on Monday before milder temperatures arrive.

Mexico - Mornings will cool with an increased chance of frost later in the week, lows in the 30s to 40s, highs in the 60s to 70s, and mostly dry conditions with light, isolated showers through December 27th.

FREIGHT

Quiet week with Christmas this week, which will give way to a busier weekend after Christmas. We expect both sides of the supply chain to be light on labor, and that would include truck drivers.



IN PEAK SEASON



Save
the Date!



PRO*ACT
SUMMIT
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 stay tight across most varieties, as pack-out size profiles continue to peak on larger sizes, especially in Granny Smith and Fuji apples. With schools closed for the holidays, lighter demand should help keep prices stable.

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



Asparagus



Asparagus production from Peru and Mexico remains very limited. Cold temperatures in Mexico are slowing growth, while heat-related quality issues are causing a decline in Peruvian volumes. Expect the markets on both coasts to stay high for the next month.

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 the size curve skewed toward smaller fruit, which is more readily available, while larger fruit remains limited. Pricing is softer for smaller sizes but continues to hold strong for larger fruit. As the season progresses and harvests shift to higher elevations, fruit sizing is expected to improve by year-end. The industry anticipates strong supplies from Mexico through the remainder of the year, presenting excellent promotional opportunities for smaller fruit.

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



Bell Peppers

Green and red bell pepper markets remain active, with elevated prices as production shifts to southern growing areas. Supply has moved to Mexico following California's season end, with weather challenges affecting availability. South Florida's warmer weather is improving volumes and slightly lowering prices, while supplies from Mexico and Central Texas are tight, driving higher prices due to strong demand and weather impacts.

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

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

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Commodity Updates



Berries (Blackberries)

Blackberries are readily available from Central Mexico, while Baja supplies may see a slight dip next week due to holiday-related labor disruptions.

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



Berries (Blueberries)

There is heavy volume available from Peru, Mexico, and Baja. Markets are expected to remain stable for this item across Florida, California, New Jersey, and California.

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



Berries (Raspberries)

Production remains steady from Central Mexico and Baja, with particularly strong quality coming from the Baja region.

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



Berries (Strawberries)

Four growing regions—California, Baja, Central Mexico, and Florida—are currently harvesting. Holiday disruptions are impacting demand and labor, but markets are expected to ease off this week.

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™



Commodity Updates



Broccoli

Broccoli supplies remain strong this week, with excellent overall quality. The market is expected to stay steady as we head 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

Brussels sprout demand remains strong, supported by good supplies. Expect quality to remain high as we approach the weekend.

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



Carrots

Harvest in the Bakersfield area is ongoing for the Fall season and is expected to continue through February. The 60 days of 100+ degree temperatures this past summer have led to a challenging season, with smaller sizing and tighter supplies. Allocations may become necessary as the season progresses.

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 remains highly limited this week, with overall quality rated as fair due to reports of mildew and slight discoloration. Supplies are tight across most shippers but are expected to gradually improve heading into the weekend.

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



Celery

Production remains moderate as we approach the end of the holiday season, with lighter supplies of larger sizes expected to persist for a few more weeks. Production in Yuma is anticipated to begin after Christmas with multiple suppliers. Value-added items for this commodity are currently seeing price escalations.

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

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

Key Partners



Commodity Updates



Citrus (Grapefruit)

Desert Rio grapefruit are readily available, with peak sizing at 56ct and smaller. Shipments are originating 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 (California Desert/Arizona) is performing well and will continue through February. District 1 (San Joaquin Valley) has begun with light volumes and is expected to ramp up significantly in the coming weeks.

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



Citrus (Limes)

The market remains firm as fruit continues to peak on 110/150ct sizes. Smaller fruit is scarcer, with higher prices compared to larger sizes. Expect costs to rise and supplies to become more limited as we approach January.

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. Markets for 138ct are currently low but are expected to stabilize soon. As the season progresses, peak sizing is expected to shift toward 113ct and 88ct, while 72ct and larger sizes will remain tight for the foreseeable future. Gas times are around 24 hours, and Brix levels are holding steady at 12-13, signaling a strong season for foodservice. Domestic mandarins have also started shipping.

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



Cucumber

Supply is tight in the East due to weather, but offshore Honduran cucumber production is increasing. Nogales' supply and quality remain strong.

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

Nogales and McAllen are offering strong supply and quality, while Florida's adequate supply is helping keep markets relatively steady.

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



Garlic

Garlic quality is excellent, with strong supplies anticipated to continue.

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)

Domestic red seedless grapes are still available in California, with shipments expected to continue through Christmas. Domestic greens, blacks, and red globes have finished for the season. Imported reds and greens are arriving on both coasts, though arrivals are lighter than expected. Demand for greens will exceed supply 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 for 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 are anticipated to remain strong this week, with the market staying steady as we approach the weekend.

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



Kale

Kale supplies and quality are expected to be strong this week and next, presenting a great opportunity for promotion.

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

Favorable weather in Yuma is ensuring strong supplies of this commodity. Shippers are adapting well, with reports of good weights and quality, and no price increases on value-added items. This positive trend is expected to continue into the new year.

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

Good production of romaine, green leaf, and red leaf lettuce will continue throughout the week, while butter lettuce availability will be limited. There are no price escalations for value-added leaf products, and romaine hearts will also be available in good supply. Overall, the quality of all leaf items is expected to remain favorable.

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



Lettuce Tender Leaf

Supplies and quality remain strong on all tender leaf items this week, and the market is expected to stay steady as we head into the weekend.

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



Melon (Cantaloupe)



Offshore melons are in limited supply due to vessel delays and holiday port schedules, with arrivals impacted by Tropical Storm Sara. The market for melons is tight, and triggered pricing has been activated on some items, expected to remain through December. Relief from Honduras and Costa Rica is not anticipated until late December or early next year. Quality remains excellent on offshore melons, with minimal cosmetic issues, while Mexican fruit from Nogales is limited in size 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, as Tropical Storm Sara in November affected fields and infrastructure, reducing yields. Additional offshore honeydew supplies are expected later in the month but are not yet on the water. Mexican volume is very limited, with larger honeydews peaking in size.

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



Melon (Watermelon)

Watermelon supplies are extremely limited as production from northern Mexico ends and southern Mexico fields are just beginning. East Coast and Georgia suppliers have been significantly impacted by Hurricane Milton, shifting demand to the West Coast. Offshore watermelons are expected to become available in January through various ports.

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



Mushroom

Excellent supplies and promotable volumes are expected to continue through Q1.

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



Onions

Storage quality remains excellent, with sizing trending toward jumbos. Strong export demand is driving upward pressure on market prices, while white potatoes are in tight supply. Overall, the market remains firm and is expected to stay that way until the next holiday. Lighter supplies are anticipated in the ID/OR region, while WA suppliers are expected to see improvements.

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, but this will be a tight year for pears, as the Washington crop is significantly smaller than last year's volumes. The market remains firm and is expected to stay that way throughout the year. Bartletts are currently a better buy than Anjou, but this will change once the Bartlett season ends 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, prioritizing contracted business, while preparing for 2025 contracts. Costa Rican pineapple supplies are improving, with better quality expected following upcoming rainfall. Larger fruit remains scarce, but Mexican pineapples are more available and show improved quality. Suppliers are also focusing on 2025 commitments.

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



Potatoes

The ID market is steady with strong availability and good quality as it prepares for the holiday. FOB deals are available, and transportation costs are keeping prices stable. Weather in the Northwest has limited truck supply, expected to decline through year-end. Lead time is recommended for holiday orders. Shippers are pulling from storage on smaller potatoes, while WA is limited on smaller sizes. NC sweet potato yields are lower year-over-year.

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



Squash

There is a strong supply in Nogales and Florida, with promotable volumes available.

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



Stone Fruit

Imported peaches and nectarines are expected to begin arriving on both coasts the week of 12/16, with light supplies consisting mostly of medium-sized volumes. Domestic Asian pears are nearly finished, with only a few smaller sizes remaining. Domestic kiwi are shipping in good volume, and the market is steady.

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



Tomatoes

The round tomato market is tight, with demand exceeding supply. Florida's volumes are limited but improving, with better availability expected by early January. In Mexico, larger fruit is priced at a premium. Domestic Roma tomato supplies are improving, while Mexico's steady production is experiencing price fluctuations due to quality variations, with higher-quality fruit commanding premium prices.

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



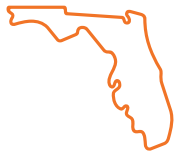
CALIFORNIA

A few showers may linger Monday morning, with skies briefly clearing before the next system arrives Monday night. Morning lows will range from the upper 30s to mid 50s, with daytime highs between the mid 50s and low 70s. Light to moderate showers will begin Monday night and continue through midnight Tuesday, with rainfall totals between $\frac{1}{2}$ " and 1". Skies will clear Tuesday night, bringing overnight lows to the upper 20s to low 30s south of King City and mid 30s to mid 40s elsewhere. The next round of rain is expected to start Wednesday night and continue through the end of the week, with total rainfall between $\frac{1}{4}$ " and $\frac{3}{4}$ ".



MEXICO

Mornings will cool slightly, with an increased chance of frost for the latter half of the week. Lows will range from the upper 30s to mid 40s on Monday and Tuesday mornings, dropping to the low 30s to low 40s from Wednesday through Friday. As mentioned, ground-level temperatures may reach freezing in some areas. Daytime highs will range from the mid 60s to mid 70s throughout the week. Any shower activity will be light and isolated, so expect mostly dry conditions through December 27th.



FLORIDA

Shower activity will increase by midweek as a cold front moves south and stalls over the state through the end of the week. Rain totals will range from 0.02" to 0.20". A slight chance of morning frost is expected in northern Florida on Monday, followed by milder temperatures moving into the region.



ARIZONA

A prolonged period of warm temperatures will continue through Tuesday, with a dry cold front arriving Wednesday morning. Highs will range from the mid 70s to low 80s on Monday and Tuesday, cooling to the 60s to low 70s by Thursday. Morning lows in Dome, Roll, and Wenden will be in the upper 30s through Tuesday, dropping to the upper 20s to mid 30s by Thursday. Larger valleys in Yuma County, central Arizona, and southeast California will experience lows in the 40s through midweek, cooling to the upper 30s to mid 40s by Friday.

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

Freight Updates



Quiet week with Christmas this week, which will give way to a busier weekend after Christmas. We expect both sides of the supply chain to be light on labor, and that would include truck drivers.



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

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

	12/02/24	12/09/24	12/16/24	Change from	
				week ago	year ago
U.S.	3.540	3.458	3.494	▲ 0.036	▼ -0.400
East Coast (PADD1)	3.597	3.535	3.575	▲ 0.040	▼ -0.394
New England (PADD1A)	3.773	3.755	3.754	▼ -0.001	▼ -0.608
Central Atlantic (PADD1B)	3.793	3.750	3.761	▲ 0.011	▼ -0.575
Lower Atlantic (PADD1C)	3.507	3.432	3.487	▲ 0.055	▼ -0.306
Midwest (PADD2)	3.521	3.425	3.450	▲ 0.025	▼ -0.356
Gulf Coast (PADD3)	3.227	3.130	3.190	▲ 0.060	▼ -0.379
Rocky Mountain (PADD4)	3.431	3.329	3.357	▲ 0.028	▼ -0.576
West Coast (PADD5)	4.164	4.119	4.130	▲ 0.011	▼ -0.525
West Coast less California	3.739	3.682	3.726	▲ 0.044	▼ -0.427
California	4.652	4.623	4.597	▼ -0.026	▼ -0.634

*prices include all taxes

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

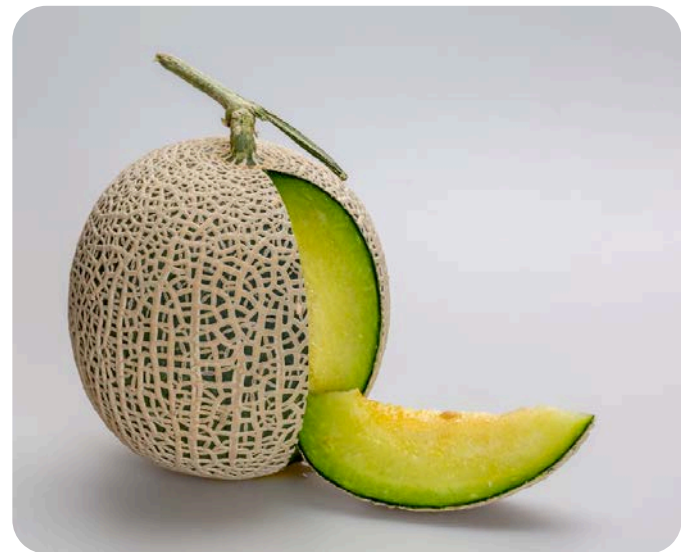
Crop Updates



Melon shippers are currently facing increased demand while supplies are limited, especially for Cantaloupe and Honeydews, which are at a "demand exceeds supply" status. Offshore melon yields have decreased by 30-50% due to the impact of Tropical Storm Sara, which hit the Central American melon-growing regions in mid-November. Guatemala fields are struggling with a virus, further limiting yields.

Costa Rica and Honduras, which are expected to begin production in early January, will also face challenges like Guatemala due to the storm's severe impact on those regions.

Honeydew production is facing difficulties due to lower yields from Mexico. Due to increased demand and limited supply, market rates are expected to rise, with immediate relief unlikely.



The melon shortage is primarily supply-driven, with limited open market opportunities. Port congestion has caused vessel delays, making forecasts unreliable. PRO*ACT's suppliers and logistics providers are closely monitoring the potential for a port strike, which could further exacerbate the melon shortage.



JOEY CAMACHO
SOURCING SPECIALIST