

The Source

Commodity of the Month - Strawberries

Driscoll's
Only the Finest Berries™

MARKET ALERTS

Avocado: Markets are strengthening, with prices rising as Mexico cuts harvests. Smaller sizes dominate, while larger sizes command premiums. California's season is slow but will ramp up by late February to early March.

Raspberries: Markets are firm for Central Mexico and Baja products, with tight supply and anticipated price increases next week.

Strawberries: Post-holiday demand has eased, but some regions are still underperforming. California is recovering from rain, while Central Mexico and Baja have steady supply after delays. Florida's production is rising, but an upcoming cold front could temporarily slow it down.

Pears: Pears are in limited supply until mid-July, when California's new Bartlett crop arrives. Washington's crop is down 25-50%, and Bartletts will finish by month-end. Bosc pears face steep volume declines, while Anjou pears are now the primary variety, with prices expected to rise.

Pineapple: Pineapple supply will remain tight until improvements in the coming month, with peak volumes expected by May. Costa Rican pineapples remain the primary source, with high demand for large crownless varieties. Rain until mid-April may affect availability and pricing.

FEBRUARY 19, 2025

CROP UPDATES

A high-pressure system will bring record-high temperatures to California and the Southwestern Desert, impacting crops like lettuce and leafy greens with increased burn and discoloration. Warm conditions will also lead to higher insect pressure, particularly from aphids and gnats, posing challenges for growers. [Read more](#)

WEATHER

Arizona - Warm, dry weather will continue through the weekend with highs in the mid-70s to upper 80s. Winds will gust to 20-30 mph in Yuma on Friday, easing by Saturday.

California - A low-pressure system will bring cloud cover today, with temps in the 30s to 40s in the morning and highs in the 60s to 70s. High pressure returns Thursday, warming temps to the 40s-50s in the mornings and 60s-70s in the afternoons through the weekend.

Florida - Rain will persist today in Florida, with totals between 0.05" and 1.00". A cooler, drier pattern arrives Thursday through Saturday, with frost possible in northern Florida. Showers return late Saturday into Sunday. Temperatures below normal.

Mexico - Warm temperatures will persist through the weekend with scattered showers tapering off by Friday. Highs will range from the low 70s to mid-80s, with morning lows in the mid-40s to mid-50s through February 23rd.

FREIGHT

Snow and ice is affecting travel through Idaho and into the Midwest this week delaying trucks along those lanes. Weather in the west is set to warm up creating ample supplies and reducing shipping delays.

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LOGISTICS

IN PEAK SEASON



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Commodity Updates



Apples

The apple market remains steady, with ample availability of foodservice sizes.

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



Asparagus

Asparagus supplies remain strong on both coasts, including larger sizes. In addition to 11 lb cases, 28 lb options are now available.

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



Avocados

ALERT

Markets continue to strengthen across all sizes. While there was initial relief on smaller sizes, prices are rising again as Mexico reduces harvests to drive higher returns. The size structure remains unchanged, with 60ct and smaller sizes most prevalent, while 48ct and larger command premium pricing. California's season has started slowly due to tight supplies from Mexico and efforts to capitalize on higher prices, but production is expected to ramp up significantly by late February to early March.

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



Bell Peppers

Green bell pepper supplies remain strong, with promotable volumes readily available. Colored bell peppers, however, remain somewhat tight. Canada is expected to enter the market by the end of March, which will help increase volume and ease supply constraints.

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

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

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Commodity Updates



Berries (Blackberries)

The market remains steady, with moderate supplies and limited demand. Shipments continue primarily from Central Mexico through McAllen and Laredo, Texas. West Coast production is expected to ramp up by mid-April, weather permitting.

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



Berries (Blueberries)

Markets are firming up, with a preference for Mexican product due to better quality. Chile continues to export steadily, though volumes are gradually declining. A slight availability gap may occur in the coming weeks.

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



Berries (Raspberries)



Markets remain firm for product from Central Mexico and Baja, with supply remaining tight. Shippers anticipate further price increases next week as limited availability continues.

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



Berries (Strawberries)



Post-holiday demand has eased, but some regions are still falling short of harvest projections. California is recovering from last week's rain, while Central Mexico and Baja are now crossing steady supplies after recent delays. Florida's production is increasing in the short term, but an approaching cold front with rain could temporarily slow output again.

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

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

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Commodity Updates



Broccoli

Broccoli quality remains strong, with only occasional yellowing and brown bead. Warmer weather is improving sizing, and the market is expected to stay steady through 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

Domestic production has shifted to Oxnard, with volume gradually increasing. Despite recent heavy rain, quality remains strong, though some insect injury has been observed. Meanwhile, value-added production in Mexico is in full swing, with additional capacity available for promotions.

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



Carrots

Harvest continues in Bakersfield for the next couple of weeks before shifting to the Imperial Valley, where the outlook remains positive. The recent freeze in the Southeast has caused delays in Lake Park, GA, but conditions are expected to improve soon. Please remember to submit snack pack orders at least 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 remain strong across all regions. While there may be occasional bruising and some minor texture issues, overall quality is excellent. The market is expected to stay steady heading into next week.

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



Celery

Supplies will surpass demand this week, allowing for pricing flexibility. Ample availability of larger sizes is expected to continue, with strong quality coming out of Yuma, Santa Maria, and Oxnard. Expect competitive pricing throughout the week.

Commodity/Region	Supply	Price	Quality
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Yuma, AZ (Dec - April)	Light	\$\$\$	Good

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

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Commodity Updates



Citrus (Grapefruit)

Star Rubies are available, with peak sizing at 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, with peak sizing at 115ct and smaller. District 3 (CA Desert/AZ) has concluded, while District 1 (San Joaquin Valley) is now the primary growing region, steadily increasing volume each week.

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



Citrus (Limes)

The market remains stable with manifest volumes peaking on smaller sizes. Quality is high, and crossings through South Texas continue to be strong for now. Offshore fruit is available in both New Jersey and Miami.

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



Citrus (Oranges)

Peak sizes have shifted to 72ct and 88ct, with markets showing slight strength on 113ct and 138ct as fruit sizing follows expectations. There are still great deals available, with Brix levels around 13. It's shaping up to be a strong year for foodservice, and Valencia oranges are expected to begin arriving in late May to early June.

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



Cucumber

There's strong volume on both coasts. Honduran supply in Florida has improved, with quality being fair. Florida domestic cucumbers are expected to ramp up by mid-March. Mexican quality remains excellent, with good availability in Nogales.

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

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

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Commodity Updates



Eggplant

The market is stable, maintaining adequate levels. Florida will remain light until spring crops start in the coming month. Production from Sinaloa is moderate, with excellent quality.

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



Garlic

Garlic quality is outstanding, and supplies are anticipated 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)

The grape market remains in a supply-exceeds-demand situation, with variable quality and lower prices.

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 onions remain in strong supply with excellent quality, and the market is expected to stay steady into next week.

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



Kale

Kale supplies are expected to remain abundant this week and next, with the market staying steady.

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

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

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Commodity Updates



Lettuce Iceberg

Yuma will have strong production of this commodity throughout the week, with shippers adjusting for volume-type orders, so please be prepared. Average weights are ranging from 41-44 pounds. With warm morning and evening temperatures in Yuma, the growth pattern will accelerate. Expect robust supplies all week.

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

Warm weather in the growing regions has led to strong supplies of green and red leaf, as well as romaine, with excellent availability of romaine hearts. Shippers are flexing, ensuring above-average quality from multiple sources throughout the week. Take advantage of the strong supplies and promote as much as possible. Expect good weights on all leaf items.

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



Lettuce Tender Leaf

The quality of tender leaf items like arugula, spinach, and cilantro continues to improve, with minimal issues such as mildew, discoloration, and tip burn. Expect both quality and supply to keep improving in the coming days.

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



Melon (Cantaloupe)

Cantaloupe prices remain high due to ongoing offshore growing conditions and supply chain challenges. However, the spring crop (third rotation) from Guatemala is nearing harvest and is expected to bring some relief, with prices likely normalizing closer to contract levels. Growing conditions in Guatemala and Honduras have improved and should remain favorable for cantaloupe production.

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

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

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Commodity Updates



Melon (Honeydew)

Nogales honeydews from Mexico are currently available, with the market peaking on larger sizes. Pricing is highly competitive, driven by the influx of new growers in the region. Offshore honeydew supplies are also improving and are now available at all major ports.

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

Due to reduced acreage in Mexico, Nogales watermelons are expected to see steady demand for the remainder of the season. Offshore watermelons are in strong supply and are helping to meet demand during gaps in Mexican watermelon availability.

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

Supplies and availability are excellent nationwide.

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

The quality of storage crops is currently excellent, with a strong supply of red and yellow onions from Western Idaho. Suppliers are open to making deals as demand begins to ease, particularly for jumbo red and yellow onions. However, upcoming storms across the country may cause some transportation disruptions, with cold weather expected in Oregon, Idaho, Oklahoma, and New Mexico this week. Growers are closely monitoring these conditions, hoping for minimal impact on upcoming crops. Mexican onions are also available in Texas.

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



Pears



Pears remain in limited supply and are expected to stay that way until mid-July, when California's new Bartlett crop becomes available. The Washington crop is down by 25-50%, depending on location and variety. Bartletts are nearing the end of their season and will likely be finished by month's end. Bosc pears have seen the steepest volume decline and will continue to be in a demand-exceeds-supply situation until the new crop arrives. Anjou pears are now the primary variety, with prices expected to rise steadily throughout the year.

Commodity/Region	Supply	Price	Quality
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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

ALERT

Pineapple supply will remain tight, with improvements expected in the coming month, and peak volumes anticipated by May. Flexibility in sizing will be necessary to balance supply and demand. Costa Rican pineapples remain the primary source, with contracted business taking priority. Large crownless pineapples are in high demand, and lower yields are expected due to rain until mid-April, which will likely continue to impact availability and pricing in the short term.

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



Potatoes

The market remains steady this week, with stable pricing. Distributors are seeking DLVD pricing rather than FOB. Freight costs have remained stable, although supplies are keeping an eye on winter storms. February is Idaho Potato Lovers Month, and both FL and ND color potatoes are available. Sweet potatoes are being supplied from NC, Mississippi, and Arkansas.

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



Squash

Markets for zucchini remain soft, with availability in Nogales and Florida. The yellow variety is significantly tighter, as the crop is running 7-10 days behind schedule. Until the crop catches up, expect continued limited supplies of yellow.

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



Stone Fruit

California kiwi are still available, with imports now joining the mix. Imported peaches, plums, and nectarines are arriving on both coasts. With moderate supplies and light demand, the market is expected to remain stable through the end of the month and into March.

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



Tomatoes

Prices are at their lowest across most items, with promotable volumes available, particularly from Florida. Availability is strong in Nogales, McAllen, and Florida.

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

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

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Weather Updates



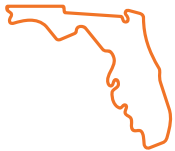
CALIFORNIA

A low-pressure system passing to the north will bring increased cloud cover and a deeper marine layer today, with no significant impacts expected. Morning temperatures will range from the mid-30s to low 40s in Santa Ynez Valley and Cuyama, while other areas will see lows in the low to mid-40s. Daytime highs will reach the low 60s to low 70s. High pressure returns Thursday, bringing offshore flow that will warm morning lows to the low 40s to low 50s and afternoon highs to the mid-60s to mid-70s through the weekend.



MEXICO

Warm temperatures will persist through the weekend with minimal changes. Isolated to scattered showers are expected through Friday, tapering off over the weekend. Rainfall amounts will generally range from 0.02" to 0.20", though higher totals are possible in thunderstorms. Daytime highs will reach the low 70s to low 80s through Saturday, rising to the mid-70s to mid-80s on Sunday across the fields of Central Mexico, with morning lows in the mid-40s to mid-50s through February 23rd.



FLORIDA

Rain continues today across northern to south-central Florida, with totals ranging from 0.50" to 1.00" in the north and 0.05" to 0.30" further south. A cooler, drier pattern arrives Thursday through Saturday, with morning frost possible in northern Florida. Showers return late Saturday into Sunday as a new front moves in, keeping temperatures below normal.



ARIZONA

A high-pressure ridge will bring warmer-than-normal temperatures and dry conditions through the weekend. Highs will range from the mid-70s to mid-80s through Friday, climbing to the upper 80s by Sunday, with morning lows in the 40s to low 50s, and mid to upper 30s in Wenden. On Friday, a tightening pressure gradient over northwestern Arizona will strengthen northerly winds along the Colorado River Valley, bringing gusts of 20-30 mph in Yuma. Winds will ease to below 20 mph by Saturday.

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

Freight Updates



Snow and ice is affecting travel through Idaho and into the Midwest this week delaying trucks along those lanes. Weather in the west is set to warm up creating ample supplies and reducing shipping delays.



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

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

	02/03/25	02/10/25	02/17/25	Change from	
				week ago	year ago
U.S.	3.660	3.665	3.677	↑ 0.012	↓ -0.432
East Coast (PADD1)	3.778	3.761	3.791	↑ 0.030	↓ -0.449
New England (PADD1A)	3.968	3.970	4.021	↑ 0.051	↓ -0.299
Central Atlantic (PADD1B)	3.986	3.974	3.980	↑ 0.006	↓ -0.375
Lower Atlantic (PADD1C)	3.682	3.661	3.696	↑ 0.035	↓ -0.493
Midwest (PADD2)	3.568	3.582	3.602	↑ 0.020	↓ -0.408
Gulf Coast (PADD3)	3.395	3.393	3.382	↓ -0.011	↓ -0.462
Rocky Mountain (PADD4)	3.471	3.528	3.510	↓ -0.018	↓ -0.447
West Coast (PADD5)	4.289	4.307	4.316	↑ 0.009	↓ -0.405
West Coast less California	3.857	3.883	3.863	↓ -0.020	↓ -0.391
California	4.787	4.796	4.839	↑ 0.043	↓ -0.419

*prices include all taxes

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

Crop Updates



A strong high-pressure system out west will bring a drastic warm up to California and Southwestern Desert regions over the next couple weeks. Record high temperatures in the mid to upper 80s are possible in the desert growing regions as the system remains stationary over the West Coast. These temperatures will cause many challenges for growers as the season begins to wind down in these desert stands.

Lettuce and leafy green crops are in good supplies with generally good quality but will likely see an increase in fringe and tip burn along with some elongated core/seeder in the warm temperatures. Epidermal peeling and discoloration will increase in the warmup and these crops will continue to show some premature pinking along the ribs that are not seen during harvest and tend to show up during transit and storage. Processed leafy green items will also likely see an increase in this oxidation/pinking showing up in the bag.

The spring mix and tender leaf items will continue to show some fringe burn, yellowing and discoloration. The warm temperatures can cause physiological changes in the plants causing leaf sensitivity resulting in a thin, weaker overall texture. For fresh-cut items this can result in increased mechanical damage and bruising during harvest and processing.

Insect pressure will certainly rise in these warm temperatures, the numerous small insects (flies, gnats, aphids, thrips) will be a continuous problem for growers in the extended warm temperatures. This looks to be the greatest challenge for growers in these regions going forward. Aphid and gnat populations can grow rapidly and are very difficult to combat as they hide in the underside of the leaves of the various crops.



TIM LYNCH

QUALITY ASSURANCE MANAGER