

The Source

Commodity of the Month - Citrus



MARKET ALERTS

Avocados: Markets are elevated due to limited holiday harvests, but supply should stabilize in a week as Mexico resumes normal harvesting. Sizes remain similar, with 60ct and smaller peaking. Please submit orders with ample lead time.

Raspberries: Harvest yields have decreased in Central Mexico and Baja, leading to fewer volume deals and limited open market availability.

Celery: Demand and availability remain moderate, with smaller sizes more abundant in Southern California and Yuma. Quality is above average with minimal seeder issues, and escalated pricing on value-added items has eased.

Cantaloupe: Offshore melons are facing a supply-demand imbalance due to lower yields in Guatemala and port delays, worsened by Tropical Storm Sara. Market supply is extremely limited, and quality may suffer from longer transit times. Triggered pricing will continue through Week 9 (Feb 24th, 2025), with no short-term relief expected from Honduras, Costa Rica, or Mexican cantaloupes.

Honeydew: Honeydew prices are high due to limited supply, port delays, and reduced yields from Tropical Storm Sara. Triggered pricing continues through Week 9 (Feb 24th, 2025), with no relief expected from Honduras, Costa Rica, or Mexican cantaloupes. Watermelons are recommended as a substitute for food cut processing.

Pears: Pears are in tight supply until mid-July, with Bartletts ending by February and Anjou prices rising.

JANUARY 22, 2025

CROP UPDATES

Cold temperatures in the Southwestern desert growing regions are delaying harvests and reducing supplies. Quality issues such as wind damage, blistering, discoloration, and smaller head sizes are expected. Tender leaf, spinach, and spring mix will also see yellowing and shorter shelf life. While early damage is minimal, freeze damage is expected to increase, potentially causing supply shortages due to slower growth rates. [Read more](#)

WEATHER

Arizona -Warming trend through Friday with light showers expected this weekend. Rainfall of ¼ inch or less, with no rain in Yuma. Morning lows rising to the 30s and 40s by Friday.

California - High pressure brings below-average lows and above-average highs. Temperatures will range from the mid 20s to mid 30s in the morning, with highs in the 60s to 70s. Light rain is expected this weekend, with total precipitation under ½ inch.

Florida -Cold temperatures, rain, freezing rain, and sleet in northern Florida, with snow north of I-10. Light rain in central and southern Florida from Wednesday to Thursday. Subfreezing temperatures through the weekend with gusty winds.

Mexico - Cool mornings with frost through Thursday and Saturday, milder on Friday and Sunday. Lows in the 30s to 40s, highs in the 70s to 80s, with dry weather through January 26th.

FREIGHT

Lettuce Ice this week is causing delays at supplier level in Yuma. We are seeing below average temperatures along the coastal valleys, also creating a slow down in supplies and longer wait times for trucks. Expect this pattern to remain for the next week.



MARKET ALERTS

Pineapples: The pineapple market is strong, with high demand for Costa Rican pineapples. Limited supply due to lower yields from heavy rainfall is expected until mid-April, and crownless pineapples are in high demand.

Squash: Squash supplies are limited due to cold weather, causing reduced volume and higher prices, especially for yellow squash. Lead time is recommended for timely order fulfillment, with cold temperatures expected through the weekend.

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Commodity Updates



Apples

The apple market is expected to remain steady throughout January, with one notable exception: Honeycrisp apples. This variety is down approximately 38% compared to last year, and prices are expected to continue rising. Overall, the Washington crop is skewing toward larger sizes, leading to limited 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 of Standards and Large sizes continue to improve on both coasts. However, Jumbo sizes remain very limited out of Mexico due to colder temperatures slowing growth. The market is expected to remain steady with slight improvements anticipated next week as production ramps up in Caborca.

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



Avocados



Markets are elevated across all sizes due to limited harvests from the holidays, leading to tight supply and industry-wide allocations. However, Mexico resumed normal harvesting this past week, and the supply pipeline should stabilize in about a week. Once that happens, markets are expected to adjust. Size structure remains similar, with 60ct and smaller peaking and 48ct and larger priced higher. Please submit orders with as much lead time as possible for ripening and inventory planning.

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



Bell Peppers

Good availability on both coasts with promotable volumes. While cold weather may slightly slow production, reduced demand due to extreme weather across the country should help keep green bell pepper prices steady at lower levels. Red bell pepper supply is gradually improving, though cold temperatures continue to contribute to low production.

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

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

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Commodity Updates



Berries (Blackberries)

Central Mexico is providing strong availability, with additional supply coming from Baja. This trend is expected to remain steady heading into next week.

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



Berries (Blueberries)

The Peruvian season is nearing its conclusion, with Chile stepping in to bridge the gap. Cooler weather has resulted in lighter Mexican production. Supplies are currently available in California, Texas, New Jersey, and Florida.

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



Berries (Raspberries)



Harvest yields for this item have decreased in Central Mexico and Baja. Volume deals are less prevalent compared to last week, and open market availability is increasingly limited.

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



Berries (Strawberries)

The winter season is in full swing, with product being sourced from Oxnard, Baja Mexico, Central Mexico, and Florida. Cold weather has slowed production across all growing regions. However, Florida temperatures are expected to improve next week, likely boosting output from that area. Other regions are forecasted to remain cooler than usual, with dry conditions anticipated for the next 8 to 10 days.

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

Supplies remain strong and consistent, though colder temperatures may slow production. As demand picks up, the market is likely to strengthen. For now, expect the market to remain steady throughout the 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 for sprouts remains steady and consistent, with no notable shifts in market outlook. Domestic production in California's Central Coast region is nearing completion, with operations transitioning to Oxnard. Meanwhile, production in Northern Mexico is gaining momentum, significantly improving supply levels in the VA category.

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 shifting to the Imperial Valley desert region, where the outlook is 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 growth has slowed due to colder temperatures, leading to a slight uptick in prices across all sizes. This upward trend is expected to persist through 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

ALERT

Demand and availability for this commodity remain moderate. Smaller sizes are slightly more abundant in Southern California and Yuma. Quality continues to be above average, with only minimal seeder issues reported. Escalated pricing on value-added items for this commodity has eased.

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

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

Key Partners



Commodity Updates



Citrus (Grapefruit)

Star Rubies are available, with peak volumes in 56ct and smaller sizes, 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 across the board. District 3 (CA Desert/AZ) is performing well and will continue through February. District 1 (San Joaquin Valley) has begun with lighter volume but is expected to ramp up over the next couple of weeks.

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



Citrus (Limes)

Demand has softened, likely due to extreme weather across the country. Prices are lower compared to last week, but we expect the market to remain active as we move into February. The new crop is expected to yield smaller limes, with larger sizes becoming increasingly limited.

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



Citrus (Oranges)

Peak sizes remain at 138ct and 113ct. While markets have seen a slight increase, they remain competitive for these sizes. As the season progresses, we expect peak sizing to shift towards 113ct and 88ct. Brix levels are in the 13 range, making it a strong year for foodservice.

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



Cucumber

Florida supply is adequate, with most of the supply now coming from offshore Honduran imports. Quality has improved compared to previous weeks. Crossings through Nogales and McAllen are moderate, while production in Sinaloa has been slowed by cold temperatures. However, there is still enough supply to meet current demand.

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

There is strong supply availability on both coasts.

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



Garlic

Garlic quality is currently excellent, 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 imported grape market has softened slightly as retail demand declined in anticipation of a potential port strike. This drop in overall demand has led to a decrease in spot market prices. Shippers are now focused on regaining momentum, with expectations of a significant volume increase in 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

Strong supplies and excellent quality are expected for green onions heading into next week. The market is anticipated to remain stable as we approach the weekend.

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



Kale

Kale supplies are expected to remain abundant this week, despite the cold morning temperatures. The market is projected to stay steady as we move 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

Good availability continues from the Yuma region at the start of the week. However, colder weather is expected to slow growth beginning next week. Some suppliers are still adjusting for larger volume orders. The cold temperatures may lead to occasional reports of blistering and peeling. There have also been some reports of misshapen heads, but overall, the quality remains above average across the industry.

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

Romaine, green leaf, and red leaf will have good availability to start the week, with multiple shippers offering supplies. While some blistering and peeling have been reported on leaf items, these issues remain minimal for now. However, cooler temperatures in the growing regions may amplify these problems next week. Production of romaine hearts is expected to remain strong throughout the week, with competitive pricing among suppliers.

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



Lettuce Tender Leaf

Supplies have remained steady and consistent so far. However, the very cold mornings are beginning to cause some yellowing and purple discoloration in the fields. As we move through this cold spell, expect yields to decrease.

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 facing a demand-supply imbalance due to lower yields in Guatemala and port delays. Tropical Storm Sara has further impacted yields, adding pressure on markets as growers strive to meet commitments. Market supply is extremely limited, and quality may be affected due to longer transit times. Triggered pricing has been implemented on some items and is expected to continue through Week 9 (week of Feb 24th, 2025). Relief from Honduras and Costa Rica is not expected in the short term, and Mexican cantaloupes from Nogales and McAllen are also in very limited supply.

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 high due to limited supply, worsened by port delays and Tropical Storm Sara, which reduced yields. Supply remains tight, and quality may be affected by longer transit times. Triggered pricing and prorates will continue through Week 9 (Feb 24th, 2025). No short-term relief is expected from Honduras, Costa Rica, or Mexican cantaloupes. Suppliers suggest substituting watermelons for food cut processing.

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



Melon (Watermelon)

Watermelon FOB prices are decreasing as inventories in Nogales increase, with light order demand despite moderate crossing volumes.

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



Mushroom

There are excellent supplies of both white and brown varieties available across the nation.

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



Onions

Demand is strong, and loading and delivery have returned to normal. Storage crop quality is excellent, with a good overall supply of red and yellow onions. However, medium-sized red onions are limited, making up only 15% of the supply. Ample jumbo red and yellow onions are available. Suppliers are actively working on contracts for the upcoming California season.

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 at least mid-July when California's new crop of Bartletts becomes available. This year's Washington crop is down by 25-50%, depending on the region and variety. Bartletts are winding down and should be nearly finished by February. Bosc saw the most significant decrease in volume and will remain in high demand until the new crop arrives. Anjou pears are the primary variety available now, and their prices are expected to gradually rise as the year progresses.

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

ALERT

The pineapple market is experiencing strong demand for Costa Rican pineapples, with contracted business taking priority. Suppliers are focusing on securing new 2025 contracts. Due to lower yields from heavy rainfall, pineapples are expected to remain limited until mid-April. Crownless pineapples are in high demand and harder to source.

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



Potatoes

The market remains steady this week, with pricing stable through the holidays. Distributors are seeking DLVD pricing over FOB due to freight challenges caused by winter storms and cold weather across much of the country. February marks Idaho Potato Lovers Month, with promotional deals available.

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



Squash

ALERT

Squash supplies are limited due to their sensitivity to cold temperatures, resulting in reduced volume and higher prices on both coasts. Yellow squash is particularly tighter than zucchini. To ensure timely order fulfillment, sufficient lead time is recommended. Cold temperatures are expected through the weekend.

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



Stone Fruit

Imported peaches, plums, and nectarines are now arriving on both coasts. While supplies are light initially, volumes are expected to increase as the month progresses. Domestic Asian pears are nearly finished, with imported varieties set to begin in about three weeks. Domestic kiwi is shipping in strong volume, and the market has seen a slight increase in price.

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



Tomatoes

Markets have stabilized for most varieties, as cold weather across the country has led to lower demand. Promotable volumes are available, and while cold temperatures may slow production, the continued drop in demand is expected to keep prices at lower levels.

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

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

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FRESH LINK



Weather Updates



CALIFORNIA

High pressure and light offshore winds continue to dominate the region, resulting in below-average lows and above-average highs. Morning temperatures will range from the mid 20s to mid 30s, with daytime highs reaching the low 60s to mid 70s. As the high pressure strengthens on Thursday, minimum temperatures will rise to the upper 20s to low 40s, while maximum temperatures will climb to the mid 60s to upper 70s. A low-pressure system is expected to move in by Saturday, bringing a slight chance of rain, with total precipitation over the weekend expected to remain under ½ inch.



MEXICO

Expect cool mornings with patchy frost today, Thursday, and Saturday, while Friday and Sunday will be milder. Lows will range from the low 30s to low 40s, rising to the upper 30s to mid 40s by Sunday. Highs will be in the low 70s to low 80s through Thursday, mid 60s to mid 70s on Friday, and low 70s to low 80s over the weekend. Dry weather is expected through January 26th.



FLORIDA

Cold temperatures with rain, freezing rain, and sleet are expected as far south as Ocala and into northern Florida. Snow may also occur north of I-10 from Tuesday evening to early Wednesday. Light cold rain showers are possible in central and southern Florida from Wednesday to Thursday. Subfreezing morning temps are forecast for northern and parts of south-central Florida through the weekend. Dry and cooler conditions will settle in by Friday, with winds gusting 20-30 mph through Friday across southeast Florida and Tampa Bay.



ARIZONA

A slight warming trend will continue through Friday as a high-pressure ridge builds. This weekend, the first rain in weeks is expected as a cold front moves in from the northwest, bringing scattered light showers to the Coachella Valley Saturday afternoon, spreading into central AZ and Imperial Valley late Saturday into Sunday. Total accumulation should range from a tenth to ¼ inch for most valleys, with no rain expected in Yuma. Morning lows will rise from the mid 20s to mid 30s today, to the 30s to low 40s by Friday and Saturday.

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

Freight Updates



Lettuce Ice this week is causing delays at supplier level in Yuma. We are seeing below average temperatures along the coastal valleys, also creating a slow down in supplies and longer wait times for trucks. Expect this pattern to remain for the next week.



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

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

	01/06/25	01/13/25	01/20/25	Change from	
				week ago	year ago
U.S.	3.561	3.602	3.715	↑ 0.113	↓ -0.123
East Coast (PADD1)	3.634	3.718	3.820	↑ 0.102	↓ -0.159
New England (PADD1A)	3.771	3.821	3.944	↑ 0.123	↓ -0.344
Central Atlantic (PADD1B)	3.801	3.876	3.976	↑ 0.100	↓ -0.256
Lower Atlantic (PADD1C)	3.559	3.649	3.750	↑ 0.101	↓ -0.103
Midwest (PADD2)	3.530	3.532	3.648	↑ 0.116	↓ -0.056
Gulf Coast (PADD3)	3.269	3.321	3.455	↑ 0.134	↓ -0.129
Rocky Mountain (PADD4)	3.430	3.399	3.485	↑ 0.086	↓ -0.211
West Coast (PADD5)	4.147	4.213	4.302	↑ 0.089	↓ -0.202
West Coast less California	3.739	3.776	3.865	↑ 0.089	↓ -0.127
California	4.618	4.716	4.807	↑ 0.091	↓ -0.285

*prices include all taxes

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

Crop Updates



Cold temperatures in the Southwestern desert growing regions are forecast to continue into next week following the heavy wind event last week. This will delay harvesting in the region until temperatures warm sufficiently for harvests to resume. This in turn will lessen overall supplies in the chain during these cold mornings.

These desert fields will see very cold morning temperatures with moderate to heavy lettuce ice across the region. The leafy green fields will likely begin to show some wind and fringe burn, feathering/epidermal peeling, blister, and discoloration in upcoming harvests. Along with blister and epidermal peel and blister you can expect to see lighter color and carton weights and smaller head size as growers trim out damaged outer leaves.

The tender leaf, spinach and spring mix items will likely show an increase in yellowing and discoloration along with weaker texture and lesser shelf life due to these growing conditions. It is important to keep your rotations in check as overall quality and shelf life of many crops, especially processed items, will be challenged in the near term.

Early field reports indicate the damage does not seem to be too extensive at the moment, however we expect to see an increase in freeze damage in the upcoming harvests as damage begins to show up in the fields. This is mainly due to an abundance of product in the fields due to the nice weather in December increasing supplies allowing growers to bypass some affected acreage. These very cold temperatures currently will drastically slow growth rates in the desert regions possibly causing some supply shortages in the future.



TIM LYNCH

QUALITY ASSURANCE MANAGER