

The Source

Commodity of the Month - Citrus



MARKET ALERTS

Avocado: Markets are elevated across all sizes due to a lack of harvest during the holidays, leading to high demand and allocations. Mexico has resumed normal harvesting, but it will take about a week for the supply pipeline to stabilize.

Grapes (Red/Green): Imported green grapes remain in short supply, with more volume on the East Coast, but not enough to ease the market. Supplies should improve late next week, but prices will likely remain steady. Domestic red seedless grapes in California are nearing the end of the season. Imported reds are arriving in lower volumes but should improve by mid-January, with adequate supplies expected for February.

Cantaloupe: Offshore melons remain in short supply due to lower yields, port delays, and Tropical Storm Sara. Quality may be affected by longer transit times, and triggered pricing will continue through Week 6 (February 3, 2025). Limited relief is expected from Honduras, Costa Rica, and Mexican cantaloupes from Nogales.

Honeydew: Prices remain high due to limited supplies from Tropical Storm Sara's impact. Offshore supplies are expected later this month, and seedless watermelons are being offered as substitutes. Mexican honeydew is limited, with production focused on larger sizes.

JANUARY 8, 2025

CROP UPDATES

Freezing temperatures and strong winds are disrupting US operations, with wildfires in Los Angeles and tight avocado supplies due to holiday delays and limited yields. Melon supplies remain low after Tropical Storm Sara, while California citrus is peaking with vibrant, smaller-sized varieties. [Read more](#)

WEATHER

Arizona - Strong winds in the low deserts will persist through Friday, with lows dropping to the 30s in Yuma and 20s in Wenden, risking lettuce icing. Highs will stay in the 60s to low 70s through Sunday.

California - Strong Santa Ana winds will persist through Friday, reaching 45 mph in Simi Valley, 40 mph in Oxnard Plain, and 35 mph in Santa Ana Valley. Morning lows will range from the upper 30s to low 50s, with daytime highs in the mid 60s.

Florida - Northern Florida is expected to experience cool mornings and possible frost, with light and patchy frost in southern areas. Moderate icing is expected north, with a brief warm-up on Saturday and cooler temperatures on Sunday.

Mexico - Isolated showers are expected in Central Mexico, with rainfall totals generally under 0.10". Daytime temperatures will be cooler, with milder mornings and warmer days.

FREIGHT

This week freight enjoys the close of the holiday season and looks forward to uninterrupted loading at supplier level. Weather issues are coming into play this week as high winds effect the Los Angeles area, and snow/ice is predicted to affect interstate 40 and the south.



IN PEAK SEASON



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Commodity Updates



Apples

Apple supplies from Washington are expected to increase this month as packing sheds return to regular schedules now that the holidays are behind us. Markets should remain steady, with strong availability across all varieties except Honeycrisp. Honeycrisp volumes are significantly lower than last year, and retail bag programs have pushed prices back to historic highs.

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



Asparagus

Mexican asparagus volumes remain low due to cold temperatures, though warmer conditions are expected by the end of this week. Production in Caborca is anticipated to improve the week of January 27th. Meanwhile, Peruvian volumes continue to decline, driven by quality concerns linked to warmer temperatures.

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



Avocados

ALERT

Markets are currently elevated across all sizes. The lack of harvest during the past two weeks due to the holidays has significantly impacted supply availability. Product is in high demand, with allocations occurring across the industry. While Mexico has resumed normal harvesting this week, it will take another week or so for the supply pipeline to stabilize.

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



Bell Peppers

Availability of green bell peppers has improved, with prices decreasing on both coasts. However, rain in Sinaloa this week and cold weather in Florida may slow production. Red bell peppers from Mexico remain limited, with good quality overall, though some greening may be present.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

Blackberries remain in good supply from Central Mexico and Baja, though some transfer delays to the West Coast have been reported. Shippers are expecting a spike in production through the end of January.

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



Berries (Blueberries)

Peruvian volume is declining, while Chilean fruit is just beginning to arrive at the ports, helping to fill the gap. Central Mexican production is steady to light. Availability is expected to remain consistent throughout January.

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



Berries (Raspberries)

Supplies from Central Mexico and Baja continue to cross into the U.S. at moderate to steady levels.

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



Berries (Strawberries)

Florida is experiencing a cold snap, with nighttime temperatures dropping as low as 32 degrees, slowing berry growth and limiting availability in the region. Increased demand has shifted supply from Texas and California. Active growing areas include Florida, Central Mexico, Oxnard, CA, and Baja, MX. With schools back in session, demand has risen, and while markets are slightly firmer, more volume is expected heading into the weekend.

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

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

Commodity Updates



Broccoli

Broccoli supplies remain strong this week, with crews managing occasional slight variations in green shading and minimal mechanical damage. Good supplies are expected to continue through next week as well.

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

Brussels sprout demand remains strong, supported by good supplies. Quality is expected to stay consistent and remain high heading into the weekend.

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



Carrots

Harvest continues in the Bakersfield area for the Fall season, running through February. Due to 60 days of 100+ degree temperatures this past summer, growers are anticipating a tight Fall season. Allocations may be implemented at some point, as sizing is expected to be on the smaller side.

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 are strong from Santa Maria, Mexico, and Yuma, with the market expected to remain steady into next week. Suppliers are seeing consistent sizing and color, with excellent overall quality.

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



Celery

The market remains steady across most suppliers, with large sizes showing the lightest availability. However, all orders are being fulfilled in full. Production in Yuma is steadily increasing each day. Value-added items remain on escalation, while overall quality is strong, with only minimal reports of seeder.

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

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

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Commodity Updates



Citrus (Grapefruit)

Star Rubies are available, primarily peaking on 56ct and smaller sizes, and are being shipped 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 are 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 volumes 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)

Prices are rising as crops near the end of their cycle. The fruit is currently peaking in 110/150 count sizes, but as we move into the new crop cycle in February, expect a shift toward smaller sizes. Offshore fruit is also available, which will help contribute to overall supply.

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



Citrus (Oranges)

Navels are performing well, with peak sizes in the 138ct, 113ct, and 88ct ranges. While 138ct supplies are currently low, they should stabilize soon. As the season progresses, peak sizing is expected to shift toward the 113ct and 88ct sizes. Sizes 72ct and larger will remain tight for the foreseeable future. Gas times are around 24 hours, if any at all, and Brix levels are in the 12-13 range, making this a strong year for foodservice. Domestic mandarins have also started.

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



Cucumber

Cucumbers from Nogales are in moderate supply, with good availability and quality. In Florida, supplies are limited due to an upcoming stretch of cold weather that will slow production. A small amount of offshore fruit is arriving from Honduras, but the quality is mixed. Markets are expected to rise moderately over the next few weeks.

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

There is a good supply coming from both Florida and Nogales, with quality remaining strong. Expect steady markets over the next few weeks, with promotable volume available.

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



Garlic

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

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Steady	\$\$\$	Good
Bakersfield, California (Year Round)	Steady	\$\$\$	Good
Gilroy, California (Year Round)	Steady	\$\$\$	Good



Grapes (Green / Red)



Imported green grapes remain in short supply, with more volume arriving on the East Coast than the West, though not enough to ease the market. Supplies should improve late next week, but prices are expected to hold steady. Domestic red seedless grapes in California are nearing the end of the season, with shippers finishing in 7-10 days. Imported reds are arriving in lighter-than-expected volumes but should improve by mid-January, with adequate supplies anticipated for February.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies are strong this week, with good quality overall. However, high winds in Mexico may shorten harvest times. The market is expected to remain mostly steady heading into the weekend.

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



Kale

Kale supplies are expected to be abundant this week, with strong quality continuing into next week.

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

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

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Commodity Updates



Lettuce Iceberg

Strong supplies of this commodity are expected throughout the week, driven by ideal weather in the Yuma region, which has accelerated production. Shippers are competitive, offering attractive deals for volume orders. Quality is anticipated to be above average, with weights ranging from 39 to 44 pounds.

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 lettuce will have strong supplies throughout the week, while butter lettuce is expected to remain limited. Romaine heart production is projected to be robust. Some minor fringe and tip burn has been reported on leaf items but remains minimal.

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



Lettuce Tender Leaf

All tender leaf items are in good supply and excellent quality this week. The market and supplies are expected to remain steady into next week.

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



Melon (Cantaloupe)



Offshore melons remain in short supply due to lower yields in Guatemala, port delays, and Tropical Storm Sara. Quality may be impacted by longer transit times. Triggered pricing will continue through the week of February 3, 2025 (Week 6). Relief from Honduras, Costa Rica, and Mexican cantaloupes from Nogales is limited.

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

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

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Commodity Updates



Melon (Honeydew)

ALERT

Honeydew prices remain elevated due to limited supplies. Tropical Storm Sara in November impacted fields and infrastructure, reducing yields on shipments. Additional offshore honeydew supplies are anticipated by the end of the month but have not yet shipped. To address the shortage, suppliers are offering seedless watermelons as a substitute. Mexican honeydew volume is very limited, with production primarily focused on larger sizes.

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



Melon (Watermelon)

Watermelon supplies are gradually increasing, resulting in a softening market on the West Coast. Post-holiday demand remains light, with additional volumes now becoming available from Florida.

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



Mushroom

Product availability is improving as holiday demand begins to subside.

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



Onions

Post-holiday demand is strong, with excellent quality on storage crops. There is a good overall supply of red and yellow onions, though medium-sized red onions are limited in Washington, Idaho, and Oregon. The market is currently peaking on jumbo red and yellow onions.

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

Bartlett pear volume will start to wind down this month, putting upward pressure on the Anjou market and leading to a gradual price increase. This will be a tight year for pears, as Washington's crop is significantly lower than last year's volumes. The market is firm and expected to remain so throughout the year. While Bartletts are still a better value than Anjou, this will only last until the end of January, when Bartletts are expected to finish for the season.

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 finalizing new contracts for 2025, but an industry-wide shortage of pineapples persists. This trend is expected to continue due to unfavorable weather patterns in the tropics and lower year-over-year yields. Market availability remains limited, with the added concern of a potential port strike impacting supply. Suppliers are maintaining six-week averages, prioritizing contracted business. While larger fruit is scarce, Mexican pineapples are more available, with improved quality as suppliers prepare for 2025 contracts.

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



Potatoes

The potato market has remained steady post-holiday, with pricing holding steady throughout the holidays. However, prices are expected to firm up for the remainder of the season. Truck availability may continue to be a challenge due to the extreme storms affecting logistics. February is Idaho Potato Lovers Month.

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



Squash

Overall supply from Florida and Nogales is strong, but there is still a significant amount of older product coming from the northern growing region of Sonora. Newer crops from Sinaloa have begun, offering better quality. Once the older crops are finished, supply is expected to tighten. Additionally, cold weather in Florida will slow production, leading to higher prices.

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



Stone Fruit

Imported peaches and nectarines have started arriving on both coasts, with light supplies primarily consisting of medium-sized volumes. Domestic Asian pears are nearly finished, with only a few smaller sizes remaining. Domestic kiwi is shipping in good volume, and the market remains steady.

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



Tomatoes

Production is increasing on both coasts as Sinaloa ramps up and Florida begins its post-hurricane crop harvest. However, rain in Mexico and cold weather in Florida may slow production. Overall quality remains good, with availability in Nogales, McAllen, and Florida.

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

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

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Weather Updates



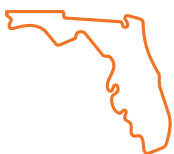
CALIFORNIA

Strong Santa Ana winds will persist through Friday, with wind gusts reaching up to 45 mph in Simi Valley, 40 mph in Oxnard Plain and Ramona, 35 mph in Santa Ana Valley, and up to 30 mph in other areas. Morning lows will range from the upper 30s to low 50s, while daytime highs will be in the mid 60s to low 70s. Winds will begin to taper off Friday night, and temperatures will cool, with highs in the upper 50s to mid 60s over the weekend.



MEXICO

Isolated showers are expected in Central Mexico Wednesday through Thursday, with rainfall totals generally under 0.10". The latter half of the week and weekend will be drier. Daytime temperatures will be cooler through Thursday, with milder mornings, followed by warmer days and cooler nights from Friday to Sunday. Max temps will range from mid 60s to mid 70s through Thursday, upper 60s to mid 70s on Friday, and low to mid 70s over the weekend. Lows will be in the low 40s to near 50 through Friday, then upper 30s to upper 40s for the weekend.



FLORIDA

Cool mornings and possible frost are expected across northern Florida, extending as far south as Spring Hill to the west and possibly around St. Augustine to the east. Frost in these southern areas will be light and patchy. Moderate icing is expected further north, near the Florida/Georgia border, into Friday morning. A brief warm-up is expected on Saturday morning, followed by cooler temperatures behind the frontal passage on Sunday morning. Conditions will remain dry through Thursday, with isolated to scattered showers over northern and central Florida on Friday and Saturday, followed by cooler, drier weather for Saturday evening into Sunday.



ARIZONA

As of Tuesday morning, a deep low-pressure system over the northern Sea of Cortez has triggered a strong wind event in the low deserts, expected to persist through Friday morning. Northerly winds gusting 25-30 mph will likely keep morning lows in the 40s across most fields on Wednesday. However, a brief lull in winds Thursday morning could drop minimum temperatures to the low-to-mid 30s in Yuma County and mid-20s in Wenden. Imperial and Coachella Valleys are forecast to see lows in the low-to-mid 40s on Thursday, cooling further to mid-30s to low-40s on Friday. Widespread lettuce icing is anticipated near Yuma from Thursday through the weekend. High temperatures will range from the 60s to low 70s across most valleys through Sunday.

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

Freight Updates



This week freight enjoys the close of the holiday season and looks forward to uninterrupted loading at supplier level. Weather issues are coming into play this week as high winds effect the Los Angeles area, and snow/ice is predicted to affect interstate 40 and the south.



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

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

	12/16/24	12/23/24	12/30/24	Change from	
				week ago	year ago
U.S.	3.494	3.476	3.503	↑ 0.027	↓ -0.373
East Coast (PADD1)	3.575	3.568	3.587	↑ 0.019	↓ -0.415
New England (PADD1A)	3.754	3.757	3.753	↓ -0.004	↓ -0.581
Central Atlantic (PADD1B)	3.761	3.763	3.774	↑ 0.011	↓ -0.530
Lower Atlantic (PADD1C)	3.487	3.476	3.501	↑ 0.025	↓ -0.357
Midwest (PADD2)	3.450	3.449	3.469	↑ 0.020	↓ -0.281
Gulf Coast (PADD3)	3.190	3.154	3.196	↑ 0.042	↓ -0.369
Rocky Mountain (PADD4)	3.357	3.328	3.370	↑ 0.042	↓ -0.517
West Coast (PADD5)	4.130	4.079	4.110	↑ 0.031	↓ -0.508
West Coast less California	3.726	3.645	3.705	↑ 0.060	↓ -0.421
California	4.597	4.580	4.576	↓ -0.004	↓ -0.608

*prices include all taxes

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

Crop Updates



An Arctic blast has brought ice, snow, and wind to most of the US and freezing temperatures into the Southeast. Wildfires in Los Angeles County, driven by intense Santa Ana winds, have caused intermittent electricity outages at packing facilities and disrupted Los Angeles operations. The threat of the glooming port strike remains very much in play for the next week. Towards the end of the month, melons and avocados face supply disruptions.



Central American melons continue to face persistent challenges. Tropical Storm Sara's impact weighs heavily on cantaloupe and honeydew supplies. Offshore shipments remain extremely limited due to flooding and crop losses. Replanted fields will slightly improve volumes by late January. Still, tight supplies and elevated prices will persist over the next few weeks. Mexican honeydew yields are winding down, and offshore shipments from Central America are minimal. Expect stocks to remain tight with elevated prices through February.



The avocado market is tightening significantly. This month, there is a projected 25-30% supply shortage due to reduced USDA inspections over the holidays, weather-related trucking delays, and limited yields across major growing regions. Mexican avocados are particularly scarce, with uneven ripening sometimes affecting quality. Colombia is helping to supplement demand on the East Coast, and California production will begin later this month. With Super Bowl Sunday one month away, surging demand puts even more strain on an already tight market.



Although we're facing some difficult supply challenges, California is reaching peak citrus production. Cara Caras, Bloods, Minneolas, Sumos, and mandarins are readily available. Sizing is leaning towards the smaller side, which makes their vibrant colors and sweet, juicy flavors ideal for brightening plates.

JOEY PIEDIMONTE
SOURCING MANAGER