

The Source

Commodity of the Month - Romaine Lettuce



MARKET ALERTS

Strawberries: California supply remains limited due to cold weather and shorter days, but volumes from Central Mexico and Baja are expected to increase next week, improving availability.

Iceberg Lettuce: Demand continues to exceed supply and is expected to remain high for at least two more weeks, with a drop anticipated during the holiday week. Production in Huron is light, and prices for value-added items and carton lettuce are elevated due to lightweight products, with industry-wide reports of pinking, discoloration, and lightweights.

Lettuce Leaf: Green and red leaf supplies are tight, while romaine remains in high demand, with shortages expected to last for weeks. Production in Huron is nearly done, and prices for romaine value-added items and contracts remain high. Romaine heart supplies are also limited, and common defects include lightweights, small sizing, and tip and fringe burn.

Mushrooms: Supplies are limited across the U.S. and California as the holidays approach, with most growers maintaining typical production levels. Supplies are expected to improve, and prices should decrease in early January.

Onions: Storage quality is excellent, with jumbo sizes trending. Strong export demand is driving up market prices, especially for red and white varieties. The market remains firm and is expected to rise further after the holidays.

NOVEMBER 13, 2024

CROP UPDATES

Rain in Salinas will increase disease pressure as harvests finish, with cooler temps improving texture. Yuma harvests are ramping up, but cooler weather has slowed growth, causing light lettuce icing. Lettuce and leafy green supplies remain light, with reduced texture and shelf life expected through November due to cold temperatures. [Read more](#)

WEATHER

Arizona - Expect dry, near-to-below-normal temperatures today and tomorrow, with a cold front arriving Friday. Winds will pick up, and low temperatures will drop over the weekend. Light lettuce icing is possible today and tomorrow, with moderate icing expected Saturday and Sunday.

California - After a cold morning, cloud cover will increase as a low-pressure system arrives late today. Morning lows will range from the mid 20s to mid 40s, with daytime highs reaching the mid 50s to low 70s. A second system will bring heavier rain on Friday.

Florida - Temperatures will cool later in the week, with cooler mornings expected through the weekend. Dry weather is forecasted, and winds will gust up to 30 mph on Wednesday, with 20-25 mph winds in southeast Florida through November 15th.

Mexico - Expect seasonal temperatures with highs in the upper 70s to 80s and cooler mornings in the mid 40s to 50s. Isolated showers are possible as high pressure persists through Sunday.

FREIGHT

Yuma's full start is Monday, the 18th, and trucks are still loading in Salinas. We are advising trucks to be ready to load in Yuma. Pre-booking capacity is a top priority this week. While we expect things to run more smoothly next week, we are preparing for potential changes this week.



IN PEAK SEASON



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Commodity Updates



Apples

The November apple story centers around sizing. Some varieties, like Granny Smith, Pink Lady, and Honeycrisp, are in limited supply due to a smaller harvest compared to last year. Across most varieties, foodservice sizes are particularly tight because of a shift in the overall crop size profile, with many apples peaking at larger sizes, such as 80s and above. This trend affects retail bag programs, as shippers are now using smaller apples (138s, 125s, and even 113s) for bagged options, increasing scarcity and driving up prices for foodservice. We're hopeful this situation will improve as the new crop progresses.

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



Asparagus

The asparagus market remains slightly elevated on both coasts as we approach the Thanksgiving demand surge, particularly for larger sizes. Expect prices to increase modestly over the next couple of weeks.

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



Avocados

Markets are stable, with a heavy concentration of small fruit and limited availability of large fruit. Prices are lower for small fruit, while large fruit remains in high demand. As the fruit on the trees matures and harvests move to higher elevations, the size curve is expected to shift by year-end. The industry anticipates strong supplies from Mexico through the remainder of the year, presenting excellent opportunities to promote small fruit.

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



Bell Peppers

Bell pepper supply from the Eastern region is limited due to quality issues in Georgia and the impact of hurricanes on Florida's crops; improvements are expected in 3-4 weeks. Coachella is producing moderate volumes of good-quality peppers, while Fresno and Oxnard are wrapping up their seasons. Nogales has small quantities available, with larger volumes anticipated from Sinaloa in December. The red bell pepper market remains steady at high prices, with no price relief expected until early January.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

Reduced supplies from Central Mexico are expected this week, leading to an upward trend in the market.

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



Berries (Blueberries)

Consistent supplies from Mexico and Peru are keeping the market stable across California, Texas, and the Eastern Seaboard—a trend likely to continue over the next several weeks.

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



Berries (Raspberries)

Lighter crossings from Central Mexico and Baja are anticipated, keeping markets elevated and limiting the availability of open market fruit.

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



Berries (Strawberries)

ALERT

Supply from California remains limited as colder days and shorter daylight hours slow production. However, volumes from Central Mexico and Baja are expected to increase over the next week, improving overall availability.

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

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

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Commodity Updates



Broccoli

Broccoli supplies remain extremely limited, with crews addressing occasional issues like brown bead, pin rot, and mechanical damage. Light to moderate supplies are expected heading into next week.

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



Brussel Sprouts

Total available volume remains strong this week, and the market tone is expected to improve as we approach the holiday. Product quality is showing signs of improvement, though some mildew staining and rough, elongated seed stems are still present.

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



Carrots

Harvest is currently ongoing in the Soledad and Shandon, CA areas and will continue through mid-November. We will then shift back to Bakersfield for the Fall season, starting in late November or early December, running until February. Due to 60 days of 100+ degree temperatures this past summer in the Bakersfield region, growers are expecting a tight Fall season, with the possibility of allocations during this time. Additionally, hurricane damage in Lake Park, Georgia has disrupted crops, requiring replanting, which will delay the season by nearly two months. 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 supplies are gradually improving, and the market is expected to remain steady heading into the weekend.

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



Celery

Supplies are moderate in both Santa Maria and Oxnard, with Salinas finished for the season and Yuma not starting production until the end of December. The best availability continues with larger sizes, particularly 24-counts. Quality is above average across most suppliers. This market is expected to strengthen as we approach Thanksgiving.

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

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

Key Partners



Commodity Updates



Citrus (Grapefruit)

Desert Rios are beginning to come online in limited quantities, shipping out of Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

Markets remain steady overall. District 3 (CA Desert/AZ) is performing well and will continue through February. District 1 (San Joaquin Valley) has started off light 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 stabilizing with a steady supply, and medium-sized fruit is becoming more abundant. Quality remains strong. As we approach December and Q2, expect prices to gradually rise, which is typical for this time of year.

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



Citrus (Oranges)

The Navel season is now underway, with peak sizes in the 138ct, 113ct, and 88ct ranges. While markets are currently tight on 138ct, they are expected to stabilize soon. As the season progresses, we anticipate peak sizing to shift toward the 113ct and 88ct sizes. Larger sizes, particularly 72ct and above, will remain limited for the foreseeable future. Gas times are around 72-96 hours, and Brix levels are averaging around 12. This is shaping up to be a strong year for foodservice. Domestic mandarins have also started shipping.

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



Cucumber

Georgia's cucumber season is winding down with low volumes and quality, while South Florida is facing offgrades due to hurricane impact. Florida's supply is expected to remain tight until Thanksgiving, with Honduran imports beginning in mid-to-late December. Mexico's cucumber supply is increasing, offering fair to good quality from multiple regions.

Commodity/Region	Supply	Price	Quality
Georgia (May - June)	Light	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good
Baja California (May - October)	Steady	\$\$\$	Good

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

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Commodity Updates



Eggplant

Eggplant supply in Georgia and South Florida remains limited, but an increase is expected in the coming weeks. Coachella is producing high-quality eggplant, and volumes from Sinaloa are rising. Full production is anticipated by the end of November, with shadehouse growers coming online.

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



Garlic

California garlic is in full production, with good quality and strong supplies expected 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 grape season is nearing its end, with black grapes expected to finish by the end of this week. Green grapes will follow, likely wrapping up by the week of November 18th, or slightly later. Red grapes are projected to finish by the first week of December. At this point, we don't anticipate a gap between domestic and imported grapes. Imported greens are already arriving on the East Coast, with heavier volumes expected the week before Thanksgiving, followed by reds arriving the week after Thanksgiving.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies and quality are both strong at the moment, and the market is expected to remain steady heading into the weekend.

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



Kale

Kale supplies and quality are expected to remain strong this week, with the market anticipated 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

ALERT

Demand for this commodity continues to outpace supply and is expected to remain this way for at least another two weeks. However, shippers anticipate a drop in demand during the holiday week. Production in Huron is light, and value-added items are priced at second-tier levels across all shippers. Carton lettuce is also lightweight and priced higher, which is consistent across the industry. Weights are ranging from 32 to 37 pounds, with reports of pinking, discoloration, and lightweights, which are widespread issues throughout the industry.

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



Lettuce Leaf

ALERT

Green and red leaf supplies have tightened significantly, while romaine remains highly active. Demand is exceeding supply for romaine, and this trend is expected to continue for at least the next few weeks. Production in Huron is nearly finished. Escalated pricing persists on all romaine value-added items and contracts. Romaine heart supplies are also tight and will remain so for the foreseeable future. Common defects reported include lightweights, small sizing, and slight tip and fringe burn across all romaine and leaf items.

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



Lettuce Tender Leaf

All tender leaf items remain tight as we enter the transition period. Some processors are harvesting in Yuma to help offset the shortage from the northern regions. Expect these markets to stay elevated for the next couple of weeks.

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



Melon (Cantaloupe)

Due to colder nights, the domestic cantaloupe season is gradually winding down. The Arizona-California desert season will continue through late November or early December, until offshore fruit begins arriving at domestic ports. Domestic fields are peaking on 9-count melons, and Mexican fruit from Nogales is also peaking on 9-counts. The October heat wave in Mexico has resulted in smaller fruit being priced at a premium this week. The first shipments of Florida melons have started arriving, with nine-count melons dominating the early production.

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

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

Key Partners



Commodity Updates



Melon (Honeydew)

Prices remain fairly steady as harvesting begins in Arizona. Volume is expected to increase over the next two weeks, with five-count melons dominating the early production. The Arizona-California desert season will continue through late November or early December, until offshore fruit begins arriving at domestic ports.

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

Watermelon supplies are improving on the West Coast, especially in Nogales. The Sonora fall crop will be available through November, and Jalisco fruit will begin arriving in December. The East Coast and Georgia suppliers have been significantly impacted by Hurricane Milton, which has shifted demand to the West Coast.

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

ALERT

Supplies are limited across the U.S. and California as the holidays approach. Most growers are maintaining typical production levels and do not have excess inventory. Supplies are expected to improve and prices to decrease in early January.

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

ALERT

Storage quality remains excellent, with sizing trending toward jumbos. Strong export demand is driving upward pressure on market prices, particularly for red and white varieties. The market remains firm and is expected to continue rising after the holidays.

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



Pears

All major pear varieties are currently being packed in Washington. This will be a tight year for pears, as the Washington crop is significantly down from last year's volumes. The market remains firm and is expected to stay that way throughout the year. California has now finished for the season.

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

Suppliers are maintaining 6-week averages and prioritizing contracted business. Costa Rican pineapple supplies are improving, with better quality anticipated following upcoming rainfall. While larger fruit remains scarce, Mexican pineapples are more available and show improved quality.

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



Potatoes

With Thanksgiving approaching, we're expecting busy shipping weeks ahead. It's recommended to increase lead time as shippers will be relying on storage to meet retailer demand with smaller potatoes. Availability of 80-120 count, non-A potatoes will be higher than in recent weeks, while 40-70 count potatoes will become more limited due to the increased Thanksgiving demand.

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



Squash

Yellow and zucchini squash supply is strong in Florida and Georgia, with Georgia's supply expected to last through Thanksgiving and Florida's continuing into the winter. Overall quality is good, though some scarring and scuffing may be present. Sonora's supply has improved with cooler weather, and Sinaloa is projected to reach full production by December 1st.

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



Stone Fruit

Plums are the last remaining stone fruit in season, with most shippers having already finished for the year. The remaining shippers are working through their final inventories and will conclude shipments before the end of the month. Asian pears are available in good volume, with domestic supplies expected to last through January. Domestic kiwis are also shipping in strong volume, and the market remains steady. Pomegranates and persimmons are available for loading in the Central Valley.

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



Tomatoes

Roma production in South Georgia is winding down, with only limited salvage crops available in Florida until December. Eastern round tomato supply is tight, with small, scarred fruit primarily destined for processing. Grape tomato volumes in Florida are limited, with new crops expected in 3-4 weeks. Mexican production is light, and demand is higher through late December. Tomato quality from Baja and Central Mexico is mixed, while availability from Central Mexico and South Texas is expected to be moderate over the next few weeks.

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



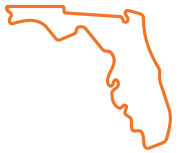
CALIFORNIA

Following another cold morning today, cloud cover will increase as a new low-pressure system arrives late in the day. Morning lows will range from the mid 20s to low 30s south of King City, with mid 30s to mid 40s further north. Daytime highs are expected to reach the mid 50s to low 70s. A second system will move in Thursday night, bringing heavier rain into Friday.



MEXICO

Expect mostly seasonal temperatures over the next five days, with highs ranging from the upper 70s to upper 80s on most days. Morning temperatures will be slightly cooler due to drier air, with lows ranging from the mid 40s to mid 50s across most areas through the weekend. Any shower activity that occurs will be widely isolated, as the region will remain under the influence of high pressure through Sunday.



FLORIDA

Temperatures will cool later in the week, with noticeably cooler mornings expected through the weekend. Dry weather is forecasted over the next five days. Winds will gust near 30 mph on Wednesday, and from 20 to 25 mph across southeast Florida through November 15th.



ARIZONA

Today and tomorrow will bring near-to-below-normal temperatures with dry conditions, ahead of a cold front arriving Friday. No rain is expected with this front, but moderate to strong westerly winds will develop before sunrise Friday and continue throughout the day. As winds subside over the weekend, low temperatures will drop significantly. Morning lows will range from the mid 30s to mid 40s in most fields today and tomorrow, warming slightly on Friday due to the high winds, before dropping to the 30s to low 40s across most SW Arizona valleys on Saturday and Sunday. Light lettuce icing is possible in Dome/Roll today and tomorrow, with light to moderate icing expected Saturday and Sunday.

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

Freight Updates



Yuma full start is Monday, the 18th. We are still seeing trucks loading in Salinas, and are directing trucks to be prepared to load in Yuma. Pre-booking capacity is one of the most important things we can do this week. We anticipate next week to be smoother, but are preparing for changes on the fly this week.



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

[full history](#) XLS

	10/28/24	11/04/24	11/11/24	Change from	
				week ago	year ago
U.S.	3.573	3.536	3.521	↓ -0.015	↓ -0.773
East Coast (PADD1)	3.605	3.590	3.579	↓ -0.011	↓ -0.641
New England (PADD1A)	3.753	3.753	3.747	↓ -0.006	↓ -0.736
Central Atlantic (PADD1B)	3.804	3.792	3.807	↑ 0.015	↓ -0.721
Lower Atlantic (PADD1C)	3.516	3.500	3.478	↓ -0.022	↓ -0.601
Midwest (PADD2)	3.569	3.517	3.504	↓ -0.013	↓ -0.804
Gulf Coast (PADD3)	3.230	3.184	3.170	↓ -0.014	↓ -0.757
Rocky Mountain (PADD4)	3.655	3.583	3.525	↓ -0.058	↓ -0.831
West Coast (PADD5)	4.206	4.190	4.180	↓ -0.010	↓ -0.959
West Coast less California	3.791	3.763	3.757	↓ -0.006	↓ -0.894
California	4.682	4.681	4.666	↓ -0.015	↓ -1.033

*prices include all taxes

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

Crop Updates



Light rain in the Salinas Valley early this week will only exacerbate the disease pressure in the valley as harvest quickly wrap up over the next week or so. More rain is likely later this week as a series of storm systems pass to the north. The cooler temperatures will help curb insect activity and improve overall texture in these remaining stands. Production from the Huron region is basically complete, leaving the Southwestern Desert regions for supplies.



Yuma harvests will continue to gain momentum this week with full production expected to come from the region around late-November. After a very warm fall weather pattern, recent cooler temperatures and strong winds have reduced growth rates across the desert regions. In the colder desert valleys, light lettuce ice is being reported with more likely into next week.



Lettuce and leafy green supplies continue with lighter carton weights due to lighter densities (puffy heads, light hearts) and seeders in these early fields. The tender spring mix and baby leaf items will continue with light production as cold temperatures in Salinas and the desert regions impact growth rates and quality. With cooler temperatures expected into next week we are looking at a possible extended period of light production from these desert regions. Overall supplies look to remain light with lesser texture and shelf life as we move through November.



TIM LYNCH
QUALITY ASSURANCE MANAGER