

The Source

Commodity of the Month - Romaine Lettuce



MARKET ALERTS

Onions: Markets are very active this week, with strong demand across all sizes and colors. White onion prices are expected to keep rising through the end of the year.

NOVEMBER 20, 2024

CROP UPDATES

Hurricanes Helene and Milton have caused significant losses in Florida, leading to limited tomato supplies and delayed harvests until mid-December. In Mexico, production is moderate, with a boost expected in mid to late December from Mainland regions, depending on weather. [Read more](#)

WEATHER

Arizona - Light lettuce icing in Dome and Roll on Wednesday and Thursday, with morning lows in the mid-30s. Temperatures will gradually warm through the weekend, with afternoon highs in the mid-70s.

California - A cold high-pressure system will settle in the area on Tuesday and Wednesday, bringing very cold conditions. Lows range from 20s to 30s, with daytime highs in the mid 50s to upper 60s. A weak low pressure system will moderate temperatures, with a stronger system on Friday increasing rainfall.

Florida - A cold front will bring scattered showers and thunderstorms across Florida Peninsula, bringing rainfall between 0.20" and 0.50". Drier and cooler conditions will prevail, with gusts of 20-30 mph.

Mexico - Wednesday may see isolated showers, with rainfall below 0.10". Cooler mornings through Saturday, with a slight chance of frost in wind-sheltered areas. Moderate temperatures by Sunday.

FREIGHT

This week the west coast fresh veg deal settles into its winter home in Yuma, AZ. Truck capacity is set to be tight for the holiday as drivers take time off. Expect long loading times and delays at the supplier level due to incoming winter storms .



IN PEAK SEASON



Save
the Date!



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SUMMIT
2025

APRIL 14 - 16, 2025
MONTEREY, CA

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Commodity Updates



Apples

The apple market remains steady with ample supplies across most varieties. However, certain types, like Granny Smith, are skewing toward larger sizes, with packouts favoring 80s and 88s. Smaller sizes, such as 125s and 138s, are in limited supply. These trends may shift as the season continues to develop.

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



Asparagus

Mexican production in Southern and Northern Baja remains low due to seasonal factors, while Caborca is expected to begin harvesting in the coming weeks. Peruvian volumes are holding steady and are projected to remain consistent for the next three weeks. Production of larger sizes is steadily improving. Although markets are currently less active, holiday demand is anticipated to drive increased activity starting next week.

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



Avocados

Markets remain steady, with a size curve favoring smaller fruit while larger sizes remain limited. Pricing is lower for smaller fruit but remains strong for larger sizes. As the season progresses and harvests shift to higher elevations, fruit sizing is expected to improve toward the end of the year. The industry anticipates solid supplies from Mexico through year-end, offering excellent promotional opportunities for smaller fruit.

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



Bell Peppers

Georgia's season is coming to an end, with declining quality as it wraps up. In Florida, quality improvements are anticipated within the next four weeks. Out West, Coachella is seeing moderate supplies with good quality, while Nogales is gradually ramping up production, with seasonal volumes expected by early December. Red bell peppers remain in tight supply, with no significant relief expected until 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

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Commodity Updates



Berries (Blackberries)

Increased volumes are crossing into the U.S. from Central Mexico and Baja, a trend expected to continue through the holiday season. Product is being actively distributed to the West Coast and is also available FOB in Texas.

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



Berries (Blueberries)

Fruit availability continues to increase, with significant volumes coming primarily from Peru and Central Mexico. Loading is currently underway from Texas, California, New Jersey, and Florida.

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



Berries (Raspberries)

Availability for this item remains limited, with markets showing elevated pricing out of Central Mexico and the Baja regions. Fruit is being transferred to forward distribution centers in Texas, California, and Florida to ensure broader access.

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



Berries (Strawberries)

Cold weather continues to limit production in California, while Mexico is beginning to show improved volumes as we approach December. In Florida, the new season is just getting underway, but most growers expect significant harvests to begin by mid to late December.

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

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

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Commodity Updates



Broccoli

Broccoli production in Salinas is tapering off, with supplies remaining extremely limited and markets elevated. Tight conditions are expected to persist through next week.

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



Brussel Sprouts

The market is expected to remain relatively strong this week. While supplies are steady, Thanksgiving demand has kept the open market active. Production of processed sprouts has shifted to Northern Mexico, although some suppliers continue to use domestic material.

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



Carrots

Harvest continues in Soledad and Shandon, CA, through mid-November, transitioning to Bakersfield for the Fall season in late November or early December. Due to 60 days of 100+ degree weather this summer, the Fall season is expected to be tight, with potential allocations. A hurricane in Lake Park, Georgia, caused significant crop damage, delaying the season by almost two months. Please 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 expected to be limited this week as suppliers wrap up production in the Salinas Valley. Yuma production has not yet reached full capacity.

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



Celery

The market is very active as we approach the Thanksgiving holiday, with large sizes showing the best availability from Southern California. Please note that loading this commodity in Yuma will incur a \$2 transfer fee, compared to direct loading in Oxnard or Santa Maria. Quality remains strong across most shippers.

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

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

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Commodity Updates



Citrus (Grapefruit)

Desert Rios are now available, with a peak 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 production on a lighter note but is expected to ramp up in the coming weeks.

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



Citrus (Limes)

Prices remain stable thanks to a consistent supply, with the size profile peaking on medium-sized fruit. However, expect prices to increase as we move into December.

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



Citrus (Oranges)

The Navel season is now underway, with peak sizes at 138ct, 113ct, and 88ct. Markets are currently tight on 138ct, but conditions should stabilize soon. As the season progresses, peak sizing will shift toward the 113ct and 88ct sizes. Sizes 72ct and larger will remain limited for the foreseeable future. Gas times are around 72-96 hours, and Brix levels are in the 12 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

The Georgia season is winding down. Due to previous weather conditions, Florida quality is currently down, and we anticipate a short supply until offshore Honduran fruit becomes available in mid-December. Mexican supply is increasing, though the quality is fair.

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

Eastern supply remains limited, but an increase in availability is expected over the next few weeks. Coachella is experiencing strong production with high-quality product. Eggplant from Sinaloa, crossing through Nogales, is on the rise, with seasonal volumes expected to pick up by early December.

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



Garlic

Garlic quality is currently 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)

Domestic green grape production came to an abrupt halt over the weekend. While they were expected to finish this week, weather conditions cut the season short. Imported green grapes have already arrived on the East Coast, with prices in the mid to high thirties. The first West Coast arrivals are expected the week after Thanksgiving. Domestic red seedless grapes remain plentiful in California, with shippers expecting to pack reds for the next 2-3 weeks. Small amounts of domestic red globes and black seedless are still available, but these varieties are likely to wrap up by the end of this week or next.

Grapes (Green)

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

Grapes (Red)

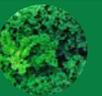
Commodity/Region	Supply	Price	Quality
Mexico (May - June)	Steady	\$\$\$	Excellent



Green Onions

Supplies of green onions remain strong, and quality has improved, with expectations for this trend to continue in the near future.

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 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

While the market has eased, supplies remain moderate at best. There is improved availability in Yuma, and supplies are expected to increase by the end of the week. Demand is anticipated to slow during the week of Thanksgiving, with multiple suppliers expected to release offers. Escalated pricing on value-added items will persist throughout the week. Light weights will continue, with average weights ranging from 32 to 38 pounds for this commodity.

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



Lettuce Leaf

Supplies of romaine, as well as green and red leaf, are improving from shippers. However, all value-added romaine and green leaf items are currently experiencing escalated pricing. This escalation is expected to ease by next week as demand diminishes following the holiday pull. Romaine hearts remain moderate to light in availability, and this trend will continue through the week. Common defects across all leaf items include small sizing and lightweights, but both issues are expected to improve after Thanksgiving.

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



Lettuce Tender Leaf

Tender leaf items remain in tight supply as production begins in Yuma. 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)

As colder nights set in, the domestic cantaloupe season is rapidly coming to a close. The Arizona-California desert season will continue through late November to early December, transitioning to offshore fruit as it arrives at domestic ports. Mexican fruit from Nogales is currently available, peaking on 9ct melons. The October heatwave in Mexico has led to smaller fruit commanding a premium this week. Florida melons have begun arriving, with strong demand as the domestic season winds down.

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

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

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Commodity Updates



Melon (Honeydew)

Prices remain fairly steady as harvesting begins in Arizona, with the crop peaking on five-count melons early in the season. The Arizona-California desert season will continue through late November and early December. Offshore honeydews are available on the East Coast, but they are commanding a premium.

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



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 is expected to begin in December. East Coast and Georgia suppliers have been significantly impacted by Hurricane Milton, leading to a shift in demand toward the West Coast.

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



Mushroom

U.S. Thanksgiving demand is outpacing available supplies, with improvements expected by late December.

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



Onions

ALERT

Onion markets are highly active this week, with strong demand across all sizes and colors. White onion prices are expected to continue rising through the end of the year.

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



Pears

All major pear varieties are currently being packed in Washington. This year poses challenges for pear supplies, as the Washington crop is significantly smaller than last year's volumes. The market remains firm and is expected to stay that way throughout the year.

Commodity/Region	Supply	Price	Quality
Hood River, Oregon (August-July)	Light	\$\$\$	Good
Yakima, Washington (August-July)	Light	\$\$\$	Good

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

Key Partners



Commodity Updates



Pineapples

Suppliers are maintaining six-week averages, prioritizing contracted business. Costa Rican pineapple supplies are improving, with quality expected to enhance after the upcoming rainfall. While larger fruit remains scarce, Mexican pineapples are more readily available and show improved quality.

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



Potatoes

The market remains steady, with excellent storage quality. There is a strong mix of carton and retail sizes, and sheds are operating at full capacity to meet the increased holiday demand.

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



Squash

Demand is currently exceeding supply. Cooler weather and rain in the forecast are expected to further tighten supplies as we transition to southern growing regions. While quality remains generally good, some scarring and scuffing are present. Supply from Nogales, sourced from Sonora, is also lighter due to cooler conditions, with a full transition to Sinaloa expected by December 1.

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



Stone Fruit

Plums are the last stone fruit still shipping and could wrap up any day now. The remaining shippers are on their final inventories and will finish by the end of the month. Asian pears are in good supply, with domestic varieties available through January. Domestic kiwi is also shipping in strong volumes, 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

Demand is currently outpacing supply. The Eastern U.S. is experiencing limited supply and quality issues with Roma and round tomatoes, with recovery anticipated by January. Grape tomato supplies are constrained, but improvements are expected by late December. Mexico is seeing light to moderate volumes, with production set to improve in mid-to-late December.

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

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

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Weather Updates



CALIFORNIA

A cold high-pressure system will settle over the area Tuesday and Wednesday mornings, bringing very cold conditions. Morning lows will range from the low 20s to low 30s south of Soledad, low to mid 30s in the coastal valleys, and mid to upper 30s in Salinas. Daytime highs will be in the mid 50s to upper 60s. A weak low pressure system will pass through Wednesday, moderating temperatures and bringing a slight chance of rain through Thursday, with totals reaching up to $\frac{2}{3}$ ". A stronger system will arrive Friday, increasing the likelihood of significant rainfall, with totals between 1-2" through Saturday. After reaching a brief high of mid 70s on Thursday, temperatures will cool on Friday.



MEXICO

Isolated showers are possible on Wednesday ahead of a cold front, with rainfall amounts generally less than 0.10" where showers occur. Mornings will be much cooler from Thursday through Saturday, with a slight chance of patchy frost in wind-sheltered areas. However, temperatures will moderate by Sunday, reducing the likelihood of frost.



FLORIDA

A cold front will bring isolated to scattered showers and thunderstorms across the Florida Peninsula from late Tuesday into Wednesday. Most of the state will receive rainfall totals between 0.20" and 0.50", with higher amounts possible along the Florida Panhandle and in stronger thunderstorms. Conditions will turn drier and much cooler from Thursday through the weekend. Winds will gust between 20 to 30 mph through November 22nd.



ARIZONA

Light lettuce icing is possible in Dome and Roll on Wednesday and Thursday, with morning lows in the mid to upper 30s. Minimum temperatures will gradually warm through the weekend. Afternoon highs will be in the mid to upper 70s across most fields on Wednesday, rising to the upper 70s to low 80s by Friday and Saturday. Increasing cloud cover is expected with a weakening frontal band on Sunday, though no significant rain is anticipated, except for a slight chance in Borrego Springs.

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

Freight Updates



This week the west coast fresh veg deal settles into its winter home in Yuma, AZ. Truck capacity is set to be tight for the holiday as drivers take time off. Expect long loading times and delays at the supplier level due to incoming winter storms .



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

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

	11/04/24	11/11/24	11/18/24	Change from	
				week ago	year ago
U.S.	3.536	3.521	3.491	↓ -0.030	↓ -0.718
East Coast (PADD1)	3.590	3.579	3.552	↓ -0.027	↓ -0.603
New England (PADD1A)	3.753	3.747	3.751	↑ 0.004	↓ -0.706
Central Atlantic (PADD1B)	3.792	3.807	3.772	↓ -0.035	↓ -0.699
Lower Atlantic (PADD1C)	3.500	3.478	3.451	↓ -0.027	↓ -0.556
Midwest (PADD2)	3.517	3.504	3.466	↓ -0.038	↓ -0.741
Gulf Coast (PADD3)	3.184	3.170	3.153	↓ -0.017	↓ -0.688
Rocky Mountain (PADD4)	3.583	3.525	3.458	↓ -0.067	↓ -0.810
West Coast (PADD5)	4.190	4.180	4.149	↓ -0.031	↓ -0.920
West Coast less California	3.763	3.757	3.706	↓ -0.051	↓ -0.865
California	4.681	4.666	4.659	↓ -0.007	↓ -0.981

*prices include all taxes

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

Crop Updates



Tomatoes

Eastern Production:

Hurricane Helene and Milton severely impacted all planted tomato acreage across Florida, the primary source for Eastern supplies from November into May. Tomato supplies from the South Georgia and Northern Florida (Quincy) region are finished for the season.

The Palmetto/Ruskin region, normally set for November and December production was devastated with up to 80% loss reported across the region. Growers in the Palmetto/Ruskin region continue to salvage what they can from storm affected acreage. These fields will continue to produce minimal supplies with generally questionable quality, smaller sizes and No. 2 grade fruit.

The Naples/Immokalee region in Southern Florida was impacted to a lesser extent with assessments indicating up to 50% loss in the region. There will be salvage efforts and some replanting in the south but yields and quality are yet to be determined. This will cause a delay in harvests in the South Florida region now expected to begin around mid to late December. Supplies look to remain limited until the Immokalee region begins harvests given no further weather disruptions.

Western Production:

Production from Mexico remains moderate currently as cooler weather in Baja slows production in this region and supplies from Central Mexico begin to decline seasonally. There is currently a wide range in quality depending on the grower and growing region. A substantial increase in production is not anticipated until mid to late December when the Mainland Mexico growing regions of Sinaloa and Culiacan begin harvest. This region, at this point, has received favorable growing conditions this season.

As always upcoming weather patterns will play a crucial role in future supply and quality from the various tomato growing regions.



TIM LYNCH

QUALITY ASSURANCE MANAGER