

The Source

Commodity of the Month - Romaine Lettuce



MARKET ALERTS

Onions: Onion markets are active with strong demand, despite a slight holiday slowdown. Prices for white onions are expected to rise as the Northwest season progresses.

Tomatoes: Demand exceeds supply for tomatoes, with East Coast romas and rounds constrained until January. Grape tomatoes are tight but expected to improve by late December; Mexico's production will rise by mid-December.

Squash: Demand exceeds supply due to cooler weather and rain, affecting southern regions. Quality is good, but some damage is noted. Nogales supply is low; full production expected by December.

Lettuce Tender Leaf: Tender leaf products are in limited supply as production starts in Yuma, with elevated market prices expected. Challenges include insect damage, inconsistent sizes, and leaf yellowing.

Celery: Most shippers see steady market conditions. Expect \$2-\$3 extra for Yuma transfers. Holiday demand has declined, but availability is good, with high-quality goods from Oxnard and Santa Maria.

Cauliflower: Supplies are tight this week due to the Salinas Valley finishing up, with Yuma production not yet ramped up. Prices are expected to remain high until next week.

Carrots: Harvest in Bakersfield runs until February, facing tight yields due to a hot summer and delays from hurricanes in Lake Park, Georgia. Submit snack pack orders 48 hours in advance.

NOVEMBER 27, 2024

CROP UPDATES

As Thanksgiving approaches, Southwestern Desert growers anticipate improved weather after a warm fall affected crop growth. Light yields and quality issues are expected, but forecasts predict drier conditions and a warming trend, potentially boosting December harvest quality. [Read more](#)

WEATHER

Arizona -Warmer temperatures are expected this week, with gusty northerly winds of 17-22 mph on Wednesday and Thursday. Morning lows range from the mid 40s to low 50s, warming to the 70s during the day, then cooling again by Friday. Winds will calm by the weekend.

California - Light to moderate rain will continue through Wednesday night, with ¼" to ½" total expected. Morning temps range from mid 30s to low 50s and highs from mid 50s to mid 60s. A second system arrives late Thursday, bringing possible light rain through Saturday with totals up to ¾".

Broccoli: Broccoli supplies are tight due to cleanup in Salinas Valley, facing issues like mechanical damage and pests. Expect continued constraints.

Strawberries: The market faces a demand-supply gap worsened by cooler weather in California. Central Mexico boosts shipments, with Baja improving in December and Florida's harvest starting mid-December.

Florida -Milder mornings are expected through Thursday, followed by a cold front bringing cooler temperatures for the latter half of the week. After some sprinkles in northern Florida, mostly dry weather is predicted until November 30th.

Mexico - Central Mexico will experience cool mornings with potential frost in sheltered areas until Thursday. Lows will range from the mid 30s to mid 40s, while highs reach the mid 70s to upper 80s. No rain is expected in the next five days.

FREIGHT

This week sees loading delays from a slow berry harvest, but Yuma improvements help. We're monitoring South Texas and Florida's winter crops.



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Commodity Updates



Apples

The apple market is currently stable and well-stocked. However, certain varieties, notably Cosmic Crisp and Fuji, are seeing a predominance of larger sizes in their packouts. Sizes 125s and 138s are becoming increasingly scarce, while sizes 80s and 88s are more readily available. This situation could evolve as the season advances. Additionally, smaller-sized Granny Smith apples are becoming more accessible.

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



Asparagus

Mexican production from Southern and Northern Baja remains low due to seasonal factors. However, we anticipate that Caborca will begin its production in the coming weeks. Meanwhile, Peruvian volumes have stabilized and are expected to maintain this consistency over the next few weeks. The market has been particularly active for larger sizes, although overall activity is beginning to taper off as the holiday rush comes to an end.

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



Avocados

The markets are stable at the moment. Currently, the size distribution leans heavily towards smaller fruits, while larger fruits are in tighter supply. Consequently, prices for small fruits are lower, while large fruits maintain robust pricing. As we approach the end of the year, we anticipate an increase in size distribution as the fruit on the trees continues to mature and harvests transition to higher elevations. Additionally, the industry is expecting a solid supply flow from Mexico through the end of the year, presenting excellent opportunities for promotions focused on small fruits.

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



Bell Peppers

Georgia's harvest is nearing completion, and Florida is beginning to show promising signs of improvement, with even better conditions expected in the next three weeks. In the West, Coachella continues to provide a moderate supply of high-quality produce, while Nogales is steadily increasing its seasonal output. We anticipate that seasonal volumes will be consistent by early December. Meanwhile, supplies of red bell peppers remain limited, with no substantial relief in sight 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

Key Partners



Commodity Updates



Berries (Blackberries)

Availability has improved coming out of the Central Mexico growing region. Product is available for transfer to the west coast or Fob McAllen Texas.

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



Berries (Blueberries)

Blueberries are plentiful coming from Peru and Central Mexico. Offshore containers are arriving steadily in Los Angeles, 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)

Product is available coming into the U.S. from Baja and Central Mexico. We are seeing fairly steady numbers moving into December.

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



Berries (Strawberries)



The market continues to experience a significant demand-supply disparity, exacerbated by rain and cooler temperatures that are hindering production in California. Meanwhile, Central Mexico is gradually increasing shipments through McAllen, Texas. Baja is anticipated to report improved figures in the first week of December. Additionally, Florida's harvest is projected to commence in the second week of December.

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

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

Commodity Updates



Broccoli

ALERT

Broccoli supplies remain highly constrained. As the Salinas Valley begins its cleanup, crews are addressing sporadic issues such as mechanical damage, pin rot, and brown bead. Additionally, diamondback moth pressure continues to be a challenge. Expect supply levels to remain tight as we head into 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 Brussels Sprouts market is currently stable, with supply levels remaining consistent. The predominant size available is medium, although jumbo specimens can also be found. Growers are actively addressing challenges such as mildew pressure, occasional irregular sizing, and sporadic seeding issues.

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



Carrots

ALERT

Harvest has returned to Bakersfield for the fall season, running until February. Due to 60 days of temperatures exceeding 100 degrees this summer, growers anticipate a tight harvest. Allocations may be necessary during this period. Additionally, hurricanes have impacted crops in Lake Park, Georgia, causing delays of nearly two months as farmers regroup and replant. 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

ALERT

Cauliflower supplies remain extremely tight this week as suppliers wrap things up in the Salinas Valley. Yuma production is not yet up to full swing. Look for this market to stay elevated until next week.

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



Celery

ALERT

The market remains steady among most shippers. Suppliers are expected to add an additional charge of \$2 to \$3 for transfers to Yuma, so please keep this in mind. While the holiday demand has largely subsided, there is still ample availability for those who require it. Additionally, the quality of goods being loaded in Oxnard and Santa Maria continues to exceed expectations.

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 available, peaking on 56ct and smaller sizes, 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)

The markets are currently stable overall. In District 3 (CA Desert/AZ), activity is robust and is expected to continue through February. Meanwhile, District 1 (San Joaquin Valley) has seen a modest start but is poised to gain momentum in the coming weeks.

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



Citrus (Limes)

Prices are stable due to consistent supply. Size manifest is peaking on mediums sized fruit. Expect prices to rise as we get into December.

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



Citrus (Oranges)

Navel season has begun, with peak sizes at 138ct, 113ct, and 88ct. While 138ct markets are low, stability is expected soon. As the season advances, we anticipate more 113ct and 88ct sizes becoming available. Sizes 72ct and larger will continue to be limited. Gas times are currently between 72-96 hours, with Brix around 12. It's a great year for foodservice, and domestic mandarins have also started.

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



Cucumber

The GA season has officially concluded. In Florida, the quality of the crop remains subpar due to the effects of earlier weather conditions, and supplies are anticipated to remain tight until the offshore Honduran fruit is expected to become available around mid-December. Meanwhile, Mexican supplies are on the rise, although the overall quality is still only fair.

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

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

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Commodity Updates



Eggplant

While supply from the East continues to be limited, we expect an increase in availability in the coming weeks. Meanwhile, Coachella is maintaining strong production levels with high-quality yields. Additionally, eggplant from Sinaloa is seeing a rise in volume as it crosses through Nogales, with seasonal supplies anticipated to ramp up by early December.

Commodity/Region	Supply	Price	Quality
California (May - October)	Steady	\$\$\$	Fair
Florida (November-May)	Light	\$\$\$	Fair
Georgia (May-June)	Light	\$\$\$	Fair
Ohio/NC/MI (June-September)	Light	\$\$\$	Fair



Garlic

Garlic quality is currently good, and supplies are expected to remain strong moving forward.

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 grapes are nearly complete and should finish this week, while imported green grapes are already available on the East Coast at prices in the low forties. The first arrivals from the West Coast are expected next week. In California, ample domestic red seedless grapes remain, with packing anticipated to continue for the next two weeks. There are limited quantities of domestic red globes and black seedless grapes, but these are likely to conclude this week.

Grapes (Green)

Commodity/Region	Supply	Price	Quality
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Grapes (Red)

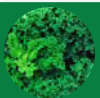
Commodity/Region	Supply	Price	Quality
Mexico (May - June)	High	\$\$\$	Excellent



Green Onions

Supplies continue to be good on Green Onions. Quality has also improved and should continue this way for the time being.

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



Kale

Kale supplies and quality continue to be good this week. Look for this market to stay steady going 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 value-added products remain elevated, this market is softer for the commodity. The primary concerns have been with weights and sizing; however, improvements are anticipated after Thanksgiving. Demand has started to decline at the beginning of the week and is expected to continue this trend. Anticipate a reduction in the escalation of value-added products over the next few weeks.

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



Lettuce Leaf

Yuma is set to see an increase in supplies of romaine, green, and red leaf lettuce from multiple shippers this week. While value-added romaine items have seen price increases, these should stabilize by the end of this week or early next. Romaine heart production has also risen in recent weeks. However, some small sizes and lightweights have been reported in leaf items, with improved weights anticipated after Thanksgiving.

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



Lettuce Tender Leaf



All tender leaf products remain in limited supply as production kicks off in Yuma. Expect these markets to remain elevated over the next few weeks. Crews are navigating challenges such as light insect damage, inconsistent bunch sizes, and sporadic yellowing of leaves.

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



Melon (Cantaloupe)

As colder nights signal the end of the domestic cantaloupe season, the Arizona-California desert season will continue until late November or early December when offshore fruit begins arriving at domestic ports. Currently, Mexican melons from Nogales are in peak supply, especially 9ct varieties. Although offshore melons are available in Florida, supply remains limited. Port delays are affecting schedules, and cold weather is impacting both domestic and Mexican production.

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

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

Key Partners



Commodity Updates



Melon (Honeydew)

Prices remain stable as harvesting begins in Arizona. Over the next two weeks, we expect to see an increase in volume, with five-count melons leading the way in early production. The Arizona-California desert season will continue until late November or early December, coinciding with the arrival of offshore fruit 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 on the West Coast are showing signs of improvement, especially in Nogales. The Sonora fall crop will be available through November, while the Jalisco variety is set to begin its season in December. Meanwhile, suppliers on the East Coast, particularly in Georgia, have faced significant challenges due to Hurricane Milton, leading to a shift in demand toward the West Coast.

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

Supplies are very limited in the holiday period. Expect supplies to improve after the first of the year.

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

ALERT

This week, onion markets are buzzing with activity, showing robust demand across all sizes and colors. Although movement has slowed somewhat due to the holiday week, we anticipate a resurgence in activity shortly. Prices for white onions are expected to keep climbing as we continue through the Northwest season.

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



Pears

All primary pear varieties are currently being packed in Washington. This year presents a challenge for the pear industry, as the crop yield from Washington is notably lower compared to last year's figures. The market conditions are stable and are anticipated to remain so throughout the year.

Commodity/Region	Supply	Price	Quality
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Hood River, Oregon (August-July)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Key Partners



Commodity Updates



Pineapples

Suppliers are consistently maintaining six-week averages, focusing on fulfilling contracted orders. The supply of Costa Rican pineapples is on the rise, and we anticipate improved quality following the upcoming rainfall. While larger fruit remains in short supply, there has been an increase in the availability of Mexican pineapples, which are exhibiting enhanced quality.

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



Potatoes

The Russet market in Idaho remains steady as we move through the week following Thanksgiving.

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



Squash

Demand outpaces supply, with cooler weather and upcoming rain likely to tighten availability as we shift to southern growing regions. Overall quality is good, though some scarring and scuffing are noted. Supply from Nogales in Sonora is lighter due to the cooler conditions, while the transition to Sinaloa is underway. Full production is expected by December.

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



Stone Fruit

Plums, the last of the stone fruits, are nearing the end of their season and will finish shipping soon, as remaining suppliers are down to their final inventories. Asian pears are available in strong quantities, with supplies expected to last through January. Domestic kiwi shipments are steady and plentiful. Additionally, pomegranates and persimmons are ready for loading in the Central Valley.

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



Tomatoes

ALERT

Demand continues to outpace supply. In the East, the availability and quality of romas and round tomatoes are still constrained, with recovery expected by January. Grape tomato supplies are also tight, but improvements are likely by late December. Meanwhile, Mexico is experiencing light to moderate volumes, with better production predicted to commence by 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

Light to moderate rain continues through Wednesday night as a slow-moving low pressure system traverses the area. Additional rainfall totals will be between $\frac{1}{4}$ " – $\frac{1}{2}$ ". Morning lows will be in the mid 30s to low 50s with daytime highs in the mid 50s to mid 60s. As skies clear Wednesday night, min temps drop to the upper 20s to low 30s south of King City with mid 30s to mid 40s elsewhere through Saturday morning. A second system arrives late Thursday with a chance of light rain through Saturday morning with additional rain totals up to $\frac{3}{4}$ ".



MEXICO

Cool mornings with the slight chance of some morning frost through Thursday morning over some of the wind-sheltered areas of Central Mexico. Lows in the mid 30s to mid 40s through Thursday and low-upper 40s for Friday and Saturday morning. Max temps in the mid 70s to mid 80s through Wednesday, upper 70s to upper 80s on Thursday and mostly mid 70s to mid 80s on Friday and Saturday afternoon. No rain over the next five days.



FLORIDA

Milder mornings through Thursday and then another cold front will bring much cooler temps again for the latter half of the week. Afternoon temps will be seasonal to start and see a dip on Friday and Saturday as cool dry air moves in behind the frontal passage. Beyond a few sprinkles over northern Florida today and Thursday, mostly dry weather is expected through Nov 30th.



ARIZONA

Warmer than normal temps expected through the week but northerly winds will strengthen Wednesday and Thursday with gusts of 17-22mph expected. Winds gradually subside into the weekend. Morning lows will be in the mid 40s-low 50s today, warming to mostly 50s Wednesday, cooling back to the mid 40s-low 50s by Friday. Look for highs in the 70s most fields.

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

Freight Updates



This week, we're experiencing some delays in loading due to a slower berry harvest. However, the transition in Yuma has been successfully completed, leading to improvements in loading times at the supplier level.

We're closely monitoring developments in South Texas and Florida, as we anticipate the start of the winter crop season. Don't miss out—reach out to us to learn more about our winter Melon LTL program from Florida!



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

[full history](#)

	11/11/24	11/18/24	11/25/24	Change from	
				week ago	year ago
U.S.	3.521	3.491	3.539	▲ 0.048	▼ -0.607
East Coast (PADD1)	3.579	3.552	3.593	▲ 0.041	▼ -0.528
New England (PADD1A)	3.747	3.751	3.776	▲ 0.025	▼ -0.671
Central Atlantic (PADD1B)	3.807	3.772	3.787	▲ 0.015	▼ -0.680
Lower Atlantic (PADD1C)	3.478	3.451	3.503	▲ 0.052	▼ -0.456
Midwest (PADD2)	3.504	3.466	3.531	▲ 0.065	▼ -0.584
Gulf Coast (PADD3)	3.170	3.153	3.203	▲ 0.050	▼ -0.590
Rocky Mountain (PADD4)	3.525	3.458	3.450	▼ -0.008	▼ -0.754
West Coast (PADD5)	4.180	4.149	4.177	▲ 0.028	▼ -0.820
West Coast less California	3.757	3.706	3.755	▲ 0.049	▼ -0.735
California	4.666	4.659	4.662	▲ 0.003	▼ -0.917

*prices include all taxes

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

Crop Updates



As we approach the Thanksgiving Holiday growers are anticipating an improved weather pattern to take shape in the Southwestern Desert growing regions. After a very warm late summer and early fall the desert regions have seen a significant cool down and some light to moderate ice in the colder valleys. The heat in the desert region impacted germination and growth rates of many crops causing irregular head formation in leafy green fields across the region. Many of these early season stands are showing light yields and carton weights due to seeder, disease pressure and other quality issues. With the improved weather pattern expected into early December along lighter post-holiday demand growers are hoping for better solidity and overall quality in upcoming stands.



In the Salinas Valley significant precipitation this week will impact the late season artichokes and Cole crops (brussels sprouts broccoli, cabbage, cauliflower) in the valley. This will likely impact yields in the remaining acreage in the Salinas Valley putting more pressure on desert supplies next week. Long range forecasts keep the West Coast dry with a warming trend and no freezing temperatures in the desert locals which should help with overall yields and quality as we move into December harvests.



TIM LYNCH
QUALITY ASSURANCE MANAGER