

The Source

Commodity of the Month - Lemons



MARKET ALERTS

Strawberries: Demand exceeds supply in California, Baja, Central Mexico, and Florida, with significant supply increases not expected until late December.

Carrots: Bakersfield harvest continues through February, with tight supply and smaller sizing due to extreme summer heat. Allocations may be needed.

Cantaloupe: Domestic season has ended, and offshore melons face delays and limited availability. Pricing remains elevated through December. Relief expected from Honduras and Costa Rica by late December.

Tomatoes: Florida's tomato production is limited due to storm damage, improving by mid-December. Baja and Central Mexico have inconsistent roma production, with increased grape tomato volumes expected by mid-December. Supply should improve in January as Sinaloa ramps up.

DECEMBER 4, 2024

CROP UPDATES

Carrot supplies are tight in California due to extreme heat affecting growth, with smaller sizes and lighter yields. Georgia's Lake Park region also faced delays from Hurricane Helene, resulting in light production. Both areas expect improved supplies soon. Florida's strawberry production was delayed by hurricanes, with small berries expected to improve as new fields begin production. [Read more](#)

WEATHER

Arizona -Warmer-than-average temps and dry conditions will persist across the low deserts this week. Light lettuce icing is possible in Mohawk Valley Wed-Thu, with lows in the 30s, while Yuma County will see lows in the 40s. Highs will be in the mid-70s to low 80s, with Coachella Valley reaching the low 80s. Northerly winds will increase Friday, with gusts of 15-20 mph.

California - Expect cool mornings and warm afternoons, with highs in the 60s to 70s and lows in the 30s to 40s. Offshore winds will raise lows, and a northern low Sunday will cool highs to the low 60s.

Florida -Frost conditions are impacting areas from the FL/Georgia border to Brooksville, FL, but will ease by Thursday into Saturday, except in sheltered northern Florida areas. Daytime temps will stay cool today, warm up Thursday, then drop again for the weekend.

Mexico - Temperatures will stay seasonal, with dry weather through Friday and a chance of showers by Saturday. Rainfall totals will be 0.02" to 0.20" by Sunday. Highs will be in the 70s to 80s, and lows will be in the 40s to 50s through Sunday.

FREIGHT

Expect truck capacity to be fairly good for the next three weeks, and prior to Christmas. Great growing weather in the west coast regions will help transit times.



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 overall. Certain varieties, like Cosmic Crisp and Fuji, are skewing larger, with packouts favoring sizes 80s and 88s, while smaller sizes like 125s and 138s are limited. However, smaller Granny Smith apples are becoming more readily available. These trends may shift as the season advances.

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



Asparagus

With cooler weather, Mexican asparagus production remains limited. Caborca is anticipating a delayed start in 2025, potentially beginning in the first or second week of February, depending on weather conditions. Mexican supplies are expected to remain tight, while Peruvian imports are helping meet demand but remain constrained, particularly for larger sizes. Markets on both coasts are likely to stay slightly elevated in the coming weeks.

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



Avocados

Markets are stable, with a predominance of small fruit and limited availability of larger sizes. Pricing remains lower for smaller fruit, while larger sizes continue to command stronger prices. As the season progresses and fruit matures, the size curve is expected to shift, with harvests moving to higher elevations. Mexico is expected to provide strong supplies through year-end, offering excellent opportunities to promote small fruit.

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



Bell Peppers

Georgia's season has ended, and any remaining supply is of lower quality. Florida is now the primary region, still recovering from hurricane damage but expected to improve over the coming weeks. Coachella's season is winding down, while Mexico's pepper season has begun with smaller sizes. Improved quality and larger offerings are expected by mid-December.

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)

Strong volumes are arriving in the U.S. from Baja and Central Mexico, with product being distributed to key points on both the West and East Coasts.

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



Berries (Blueberries)

Peak volumes are arriving from Central Mexico, Peru, and Baja, leading to soft markets as many shippers seek to move product. Key loading hubs include Central California, Florida, and New Jersey.

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



Berries (Raspberries)

Strong volumes are arriving in the U.S. from Baja and Central Mexico, with product being distributed to key points on both the West and East Coasts.

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



Berries (Strawberries)



Demand continues to exceed supply across all loading locations, including California, Baja, Central Mexico, and Florida. Baja has just started harvesting minimal volumes, while Florida is only beginning production. Significant increases in supply are not expected until late December.

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

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

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Driscoll's
Only the Finest Berries™



Commodity Updates



Broccoli

The broccoli market remains elevated as production gradually ramps up in Yuma. This higher market is expected to hold steady through the week, with supply improvements anticipated next week.

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



Brussel Sprouts

Demand remains relatively strong, even with a slight softening in open market pricing following Thanksgiving. A potential market rebound is anticipated within 1-2 weeks.

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



Carrots

ALERT

Harvest is ongoing in the Bakersfield area for the Fall season, running through February. Due to the 60 days of 100+ degree weather this past summer, growers are expecting a tight Fall season. Allocations may be necessary at some point as sizing is expected to be smaller than usual.

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 anticipated to remain limited this week, with improvement expected as we move into next week.

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



Celery

The market remains firm with most shippers as we move past the Thanksgiving holiday. Suppliers are adding an additional \$2 to \$3 charge for transfers to Yuma, at least through the end of the month. Large sizing, particularly 24-counts, is tighter but still meeting demand. The quality of product being loaded in Oxnard and Santa Maria continues to be above average.

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 available, with a peak in 56ct and smaller sizes, 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 remain steady across the board. District 3 (CA Desert/AZ) is performing well and will continue through February, while District 1 (San Joaquin Valley) has started slowly and 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 fruit peaking in medium sizes. However, prices are expected to rise as we approach January.

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



Citrus (Oranges)

The Navel orange season is underway, with peak sizes at 138ct, 113ct, and 88ct. The market for 138ct is currently low but expected to stabilize soon. As the season progresses, the focus will shift to 113ct and 88ct sizes. Larger sizes (72ct and above) 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

Florida's supply is currently limited, with Honduran imports expected by mid-December. Mexico is seeing moderate supplies, with peak production anticipated by late December. Overall quality is good, though there are minor issues with Sonoran cucumbers.

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

Eastern supply is currently limited but is expected to improve soon. Coachella is experiencing strong production and quality, while Sinaloa supply is increasing and expected to peak by early December.

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



Garlic

Garlic quality is excellent, and supplies are expected to stay steady 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 grapes are finished for the season, with imported greens already available on the East Coast, priced in the low forties. The first West Coast arrivals are expected next week. Domestic red seedless grapes are still plentiful in California, with shippers anticipating production for another week to ten days. Domestic red globes and black seedless will likely conclude for the season this week.

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 remain excellent this week. The market is expected to stay steady as we approach the weekend.

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



Kale

Supplies and quality remain strong this week, with the market expected to stay steady heading 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

Warm weather in the Yuma region, combined with a decrease in demand, has led to a surplus of this commodity. While value-added products remain elevated in price, we expect pricing to stabilize in the coming days. Weights and quality are improving with most shippers, and a few suppliers are offering flexibility—so now is a great time to promote. Quality is expected to stay strong throughout the week.

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, along with green and red leaf lettuce, are in plentiful supply with above-average quality from multiple suppliers. Romaine heart production has also increased. Ideal weather conditions in the Yuma region have contributed to stronger production of both leaf and hearts. With demand slowing after the holiday, all value-added leaf items are no longer on triggers. However, butter lettuce will remain tight for the next few weeks.

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



Lettuce Tender Leaf

There are good supplies of all tender leaf varieties this week. While the quality is currently fair, it is expected to improve with the favorable growing conditions.

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



Melon (Cantaloupe)

ALERT

The domestic cantaloupe season has concluded, and offshore melons have been impacted by holiday delays and port congestion. As a result, there is a focus on contracted business, with limited market melons available. Triggered pricing has been activated on some items and is expected to remain in place throughout December. Relief from Honduras and Costa Rica is not expected until late December or early next year. Quality remains excellent on offshore melons with minimal cosmetic concerns, while Mexican fruit from Nogales is limited in sizing and availability due to the October heatwave in Mexico, which has caused smaller fruit to be in higher demand and some growers to end their seasons early.

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 for honeydews are elevated due to limited supply, as the November Tropical Storm Sara affected fields and infrastructure, reducing yields. Additional offshore honeydew supplies are expected by the end of the month, though they are not yet in transit. Mexican volume remains very limited, with larger honeydews currently peaking.

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



Melon (Watermelon)

Watermelon supplies are currently very limited as production winds down in Northern Mexico and has just begun in Southern Mexico. East Coast and Georgia suppliers have been significantly impacted by Hurricane Milton, shifting demand to the West Coast. Offshore watermelons are expected to be available in January through various ports.

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



Mushroom

Promotable volumes of brown mushrooms are available following the Thanksgiving holiday, with excellent supplies expected to continue through the end of the year.

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



Onions

Storage quality remains excellent, with sizing trending toward jumbos. Strong export demand is driving upward pressure on market prices, particularly for red and white onions. Markets are firm and expected to stay that way until the next holiday. Idaho/Oregon white onion supply is expected to end this month, transitioning to Washington supplies.

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 being packed in Washington, but this year's crop is significantly smaller than last year's, making it a challenging season. 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

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Commodity Updates



Pineapples

Suppliers are focusing on contracted business, limiting market availability as they prepare for 2025 contracts. Costa Rican pineapples are improving, with better quality expected after rain, while Mexican pineapples are more available with improved quality. Larger fruit remains scarce.

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



Potatoes

The ID market is steady with strong availability and good quality. Weather in the Northwest is limiting truck supply, expected through year-end. Lead time is recommended for holiday orders. Shippers are pulling from storage for smaller potatoes, and WA has limited small sizes. NC sweet potato yields are lower year-over-year.

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



Squash

Eastern supply is limited due to weather, with mostly good quality but some minor flaws. Nogales supply is improving, and new crop Sinaloa supplies are increasing as Sonora squash finishes. Heavy western supply is helping to lower prices on the East Coast.

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



Stone Fruit

Plums are the last stone fruit still shipping and could finish at any time. The remaining shippers are working through their final inventories and expect to wrap up by the end of the month. Asian pears are in good volume and will be available domestically through January. Domestic kiwi are shipping steadily, with the market remaining stable. Pomegranates and persimmons are currently available for loading in the Central Valley.

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



Tomatoes



Florida roma and round tomato production is limited due to storm damage, with supply expected to improve by mid-December. Grape tomato production remains low until late December. Baja and Central Mexico are seeing inconsistent roma production, with quality and size varying. Baja rounds are finishing up, and grape tomato volumes will increase by mid-December. Supply should improve in January as Sinaloa ramps up production.

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

High pressure and offshore flow will bring cooler mornings and warmer afternoons. Lows will range from the mid 30s to upper 40s, with highs in the low 60s to low 70s along the coast and mid 60s to upper 70s inland. Offshore winds Friday will raise lows through the weekend, with a northern low Sunday cooling highs to the low 60s.



MEXICO

Temperatures will remain seasonal through the weekend, with dry weather through Friday and a chance of showers increasing by Saturday. Rainfall totals will range from 0.02" to 0.20" by Sunday. Highs will be in the low 70s to low 80s, with morning lows in the low 40s to low 50s through Sunday.



FLORIDA

Frost conditions are affecting areas from the FL/Georgia border to Brooksville, FL, but the risk will lessen by Thursday into Saturday, except in sheltered northern Florida spots. Daytime temps will stay cool today, warm up Thursday before dropping again for the weekend.



ARIZONA

Warmer-than-average temps and dry conditions will continue across the low deserts this week. Light lettuce icing is possible in Mohawk Valley Wed-Thu with lows in the mid 30s, while Yuma County will see lows in the 40s. Highs will reach the mid-70s to low 80s, with Coachella Valley hitting the low 80s. Northerly winds will increase Friday, with gusts of 15-20 mph expected.

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

Freight Updates



Expect truck capacity to be fairly good for the next three weeks, and prior to Christmas. Great growing weather in the west coast regions will help transit times.



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

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

	11/18/24	11/25/24	12/02/24	Change from	
				week ago	year ago
U.S.	3.491	3.539	3.540	▲ 0.001	▼ -0.552
East Coast (PADD1)	3.552	3.593	3.597	▲ 0.004	▼ -0.542
New England (PADD1A)	3.751	3.776	3.773	▼ -0.003	▼ -0.659
Central Atlantic (PADD1B)	3.772	3.787	3.793	▲ 0.006	▼ -0.665
Lower Atlantic (PADD1C)	3.451	3.503	3.507	▲ 0.004	▼ -0.483
Midwest (PADD2)	3.466	3.531	3.521	▼ -0.010	▼ -0.504
Gulf Coast (PADD3)	3.153	3.203	3.227	▲ 0.024	▼ -0.510
Rocky Mountain (PADD4)	3.458	3.450	3.431	▼ -0.019	▼ -0.697
West Coast (PADD5)	4.149	4.177	4.164	▼ -0.013	▼ -0.748
West Coast less California	3.706	3.755	3.739	▼ -0.016	▼ -0.679
California	4.659	4.662	4.652	▼ -0.010	▼ -0.828

*prices include all taxes

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

Crop Updates



Carrot supplies from California look to remain on the tight side for the near term as harvests transition to the Bakersfield region of Central California. This region received very warm temperatures with over 2 months of temperatures above 100 degrees during the planting and early growth stage.



These extreme temperatures impacted growth rates and early crop development in the fields. Harvests are producing a smaller size structure and lighter yields in these early stands.

The Lake Park region of Southern Georgia was impacted by Hurricane Helene that interrupted normal planting schedules in the region. Many growers had to replant following the storm resulting in delays of nearly 2 months. The region has begun very light production from the acreage that survived the hurricane with smaller size structure and lighter yields. Carrot growers in both regions are hoping to get back on track in the next few weeks as new fields begin production.



Strawberry growers in the Plant City region of Northern Florida were also impacted by Hurricanes Helene and Milton and had to delay their plantings by 3-4 weeks. The region has started very light production from fields that survived the hurricanes with small berries in the 25-30 count range. Growers are expecting improved size and quality as new fields begin production in the next couple of weeks.



TIM LYNCH
QUALITY ASSURANCE MANAGER