

The Source

Commodity of the Month - Citrus



MARKET ALERTS

Avocados: Strong markets for 48ct+; 60ct/70ct seeing relief. California's light start due to tight Mexican supply, ramping up late Feb/early March.

Blackberries: Lighter supply this week due to cold weather, but warmer temps expected to boost production in Central Mexico.

Raspberries: Low production due to cold weather and trimmings, shortages expected until next week. Warmer temps in mid-February should help yields.

Cauliflower: Supplies are tight due to cold weather, with prices expected to rise.

Celery: Supplies are light to moderate, with limited large sizes and good quality despite minor seeder issues.

Limes: Slight price increase this week, strong market activity through February. Smaller limes expected with fewer larger sizes.

Iceberg Lettuce: Lighter production in Yuma due to cold temps, causing price gaps. Issues with misshapen heads and discoloration. Moderate supply expected with warmer temps next week.

Lettuce Leaf: Lighter availability of romaine, green, and red leaf, with blistering and peeling. Romaine heart production down. No escalations on value-added items.

Tender Leaf Lettuce: Lower yields of cilantro, arugula, and spinach due to cold temps. Tight supplies expected into next week.

Cantaloupe: Supply is limited by port delays and storm damage, with quality affected and triggered pricing through February 3rd.

JANUARY 29, 2025

CROP UPDATES

Cold temperatures in the Southwestern desert will slow growth, potentially causing supply shortages. Leafy greens may show wind burn, discoloration, and smaller sizes, while processed items like spinach and spring mix could have reduced shelf life and quality. Careful rotation management is recommended. [Read more](#)

WEATHER

Arizona - Cold morning lows will continue until Friday, with Yuma Valley lows in the upper 20s to mid-30s. Highs will range from the upper 50s to 60s today, warming to the 70s to mid-80s by Sunday.

California - Dry conditions and below-average temperatures will persist through Friday, with morning lows in the upper 20s to mid-30s, and highs in the low 50s to mid-60s. A slight chance of rain and warmer temperatures are expected over the weekend.

Florida - Warm temperatures and dry conditions will persist until Friday, with a few isolated showers expected. Winds will gust between 15 to 22 mph in southeast Florida and Tampa Bay.

Mexico - Warm temperatures will continue, with isolated showers expected later in the week. Highs will range from the mid-70s to mid-80s, and lows will be in the low 40s to upper 40s.

FREIGHT

Freight this week has faced transit issues due to ice and snow out west, and low temps affecting harvest in the southern growing regions from Arizona to Florida. Shipper delays and long wait times are going to be common. Expect weather to get better next week.



MARKET ALERTS

Honeydew: Prices remain high due to limited supply, with relief expected next week from improving Mexican supplies.

Pears: In tight supply until mid-July, with Washington's crop down 25-50%, and prices for Anjou pears are rising

Pineapples: Demand is high, with supplies tight until mid-April due to heavy rainfall and boosted by Valentine's Day demand.

IN PEAK SEASON



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Commodity Updates



Apples

The apple market remains steady, with Honeycrisp as the exception—down about 38% from last year and expected to see continued price increases. Washington’s crop is skewing toward larger sizes, tightening supplies of smaller foodservice apples, especially Granny Smith and Fuji.

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



Asparagus

Asparagus supplies for Standard and Large sizes are improving on both coasts, while Jumbo remains scarce from Mexico due to cold temperatures slowing growth. The market is expected to remain steady with slight improvements next week as Caborca ramps up production.

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



Avocados



Markets remain firm at high levels for 48ct and larger, while 60ct and 70ct are beginning to see some relief. The size structure remains unchanged, with 60ct and smaller peaking, while 48ct and larger command higher prices. California has started lightly, driven by Mexico's tight supply and strong pricing. The season is expected to gain momentum in late February to early March.

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



Bell Peppers

Supplies are abundant on both coasts, and combined with moderate demand, prices remain low. Overall quality is strong. Warmer temperatures this weekend are expected to boost production in Florida and Sinaloa, with red bell pepper volumes on the rise.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

ALERT

Supplies are noticeably lighter this week due to cold weather and seasonal bush trimmings impacting yields. However, warmer temperatures later in the week should help boost production in Central Mexico.

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



Berries (Blueberries)

Blueberry harvests continue in Central Mexico and Baja, while Peru's season has ended, with only limited late-season fruit remaining. Markets are beginning to firm up slightly.

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



Berries (Raspberries)

ALERT

Recent seasonal plant trimmings, combined with cold weather, have kept production low. This shortage is expected to continue through next week, but warmer temperatures projected for mid-February should help boost yields.

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



Berries (Strawberries)

Cold weather has slowed production across all growing regions, keeping markets elevated and firm. California and Baja will experience cooler-than-normal temperatures through next week, while warming trends in Central Mexico and Florida should help boost supply by the end of the week. Production is expected to remain steady as we approach the St. Valentine's Day pull period.

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

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

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Driscoll's
Only the Finest Berries™



PRO*ACT

Commodity Updates



Broccoli

Broccoli supplies remain somewhat limited due to cold weather in Yuma, but slower demand has kept markets stable. Expect conditions to hold steady heading into the weekend.

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



Brussel Sprouts

Northern California production wraps up this week, transitioning smoothly to Oxnard with no expected supply or quality disruptions. In Northern Mexico, operations remain steady despite recent cold weather, which has slightly slowed growth and caused occasional purple discoloration and some elongated cores.

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



Carrots

Harvest continues in Bakersfield through February before shifting to the Imperial Valley, where the outlook remains positive. Grimmway's Lake Park, GA, production is set to ramp up in the coming weeks. Please remember to submit snack pack orders at least 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 tight as cold weather continues to slow growth. Expect the market to gradually rise as we head into the weekend.

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



Celery

ALERT

Supplies are expected to be moderate to light this week. Yuma production remains light, while Southern California will have moderate availability. Large sizes are still the most limited. Overall, quality remains good, with only minor seeder issues reported.

Commodity/Region	Supply	Price	Quality
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Yuma, AZ (Dec - April)	Light	\$\$\$	Good

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

Key Partners



Commodity Updates



Citrus (Grapefruit)

Star Rubies are now available, with peak sizing in 56ct and smaller. These are being shipped from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

Markets remain steady overall. District 3 (CA Desert/AZ) is performing well and will continue through February, while District 1 (San Joaquin Valley) has started off slow but is expected to pick up momentum 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 are slightly higher compared to last week, and market activity is expected to remain strong through February. The upcoming harvest will produce smaller limes, with a significant decrease in larger-sized limes.

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



Citrus (Oranges)

Peak sizes remain at 138ct/113ct, with the market slightly up but still strong for these sizes. As the season progresses, we anticipate peak sizing will shift to 113ct/88ct. Brix levels are in the 13 range, making this a good year for foodservice.

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



Cucumber

Florida's season has concluded, with Honduras now serving as the primary source of supply. Quality is average, and availability is moderate. Nogales is also seeing a good supply. Florida production will resume in March.

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

Production out of Mexico is moderate this week, with eggplant supplies tight in the eastern regions due to weather conditions. However, warmer temperatures are expected to improve production moving forward.

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



Garlic

Garlic quality is excellent, and supplies are expected to stay strong 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)

The imported grape market is adjusting following a dip in retail demand, driven by anticipation of a potential port strike. This drop in demand has led to a decrease in spot market prices. Shippers are now focused on regaining momentum, with expectations of a significant volume increase in February.

Grapes (Green)

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

Grapes (Red)

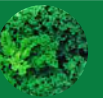
Commodity/Region	Supply	Price	Quality
Mexico (May - June)	High	\$\$\$	Good



Green Onions

Green onion supplies and quality remain excellent, and the market is expected to stay steady heading into next week.

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



Kale

Kale supplies are expected to be strong this week, with the market remaining 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

ALERT

Production for this commodity is expected to be lighter due to cooler temperatures in the Yuma region. Some shippers are in better shape than others, creating a price gap across the industry. Reports of misshapen heads, blistering, peeling, and pink discoloration have surfaced. Moderate production is anticipated this week, with warmer temperatures expected in the Yuma region next week.

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

This week, availability of romaine, green, and red leaf has started out lighter than usual. Cool nighttime temperatures have led to reports of blistering and peeling upon arrival. Romaine heart production is also experiencing reduced availability. As a result, there is a noticeable price gap in the marketplace. Currently, there are no escalations on value-added leaf items.

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



Lettuce Tender Leaf

ALERT

Cilantro, arugula, and spinach yields are lower this week due to yellowing leaves and mildew caused by the colder temperatures. Supplies are expected to remain tight as we move into next week.

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



Melon (Cantaloupe)

ALERT

Offshore melons continue to face a demand that exceeds supply. While yields have improved this week, port delays are still affecting overall supply. Tropical Storm Sara has led to reduced yields, putting additional pressure on markets as growers strive to meet commitments. Market supply of melons remains extremely limited, and quality could be impacted due to extended transit times. Triggered pricing has been implemented on some items and is expected to continue through week 6, the week of February 3rd, 2025. Relief from Mexico is not expected in the near future for cantaloupes.

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

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

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Commodity Updates



Melon (Honeydew)

ALERT

Honeydew prices remain elevated due to limited supply, with relief anticipated next week, contingent on vessel arrivals. November's Tropical Storm Sara affected fields and infrastructure, reducing yields on affected vessels. While additional offshore Honeydew supplies are expected by the end of the month, they have not yet arrived. Mexican Honeydew supplies are improving, with larger sizes currently peaking.

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



Melon (Watermelon)

Watermelon FOB prices are decreasing as inventory levels increase in the Nogales and Florida regions. Demand remains light with improved crossing volumes.

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



Mushroom

Excellent availability.

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



Onions

Storage quality remains excellent, with sizing trending toward Jumbos. Strong export demand is driving market prices up, while whites are in tight supply. Overall, the market is firm and is expected to stay that way until the next holiday. Supplies from the ID/OR region are lighter, while WA suppliers are showing improvement. Growers are preparing for the CA season, with planting set to begin once weather permits.

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



Pears

ALERT

Pears remain in tight supply and will likely stay that way until mid-July, when California's new crop of Bartletts becomes available. The Washington crop has seen a significant decrease of 25-50% depending on the region and variety. Bartletts are winding down and should be nearly finished by February. Bosc has experienced the steepest drop in volume and will remain in high demand until the new crop arrives. Anjou pears are the primary variety available now, with prices expected to steadily rise as the year progresses.

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

ALERT

The pineapple market remains strong, with high demand for Costa Rican pineapples and a focus on securing 2025 contracts. Supplies are expected to stay tight until mid-April due to lower yields from heavy rainfall. Crownless pineapples are in high demand and increasingly scarce. Valentine's Day has further boosted demand.

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



Potatoes

The market remains steady this week with stable pricing, as distributors favor DLVD over FOB pricing. Winter storms and cold weather continue to create freight challenges across much of the country. February marks Idaho Potato Lovers Month.

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



Squash

Markets are lower in Nogales compared to Florida. Cold weather has tightened supply in the East, but warmer temperatures in the forecast should help boost production.

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



Stone Fruit

Imported peaches, plums, and nectarines are now arriving on both coasts, with volumes expected to increase as we move into February. Domestic Asian pears are nearing the end of their season, with imported varieties set to begin in about two weeks. Domestic kiwi is being shipped in strong volumes, and the market has stabilized.

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



Tomatoes

Markets remain stable with a strong overall supply and promotable volumes available. Quality is good, with tomatoes shipping from Nogales, McAllen, and Florida.

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

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

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FRESH LINK



Weather Updates



CALIFORNIA

"High pressure will maintain dry conditions with near to below-average temperatures through Friday. Morning lows will range from the upper 20s to mid-30s in the Santa Ynez Valley and Cuyama, with low 30s to low 40s elsewhere. Daytime highs will stay in the low 50s to mid-60s.

A low-pressure system will pass mostly to the north this weekend, bringing a slight chance of rain. Increased cloud cover will lead to slightly warmer temperatures, with morning lows in the upper 30s to low 50s and daytime highs in the low 60s to low 70s."



MEXICO

Warm temperatures will persist through the weekend. Isolated showers may develop toward the end of the week, with potential rainfall ranging from 0.02" to 0.20" in affected areas. Highs will reach the mid-70s to mid-80s today, then settle in the low 70s to low 80s from Thursday through Sunday. Overnight lows will range from the low to upper 40s across most areas through February 2nd.



FLORIDA

Warm temperatures will continue across the region through the weekend. Dry conditions will persist through Thursday, with a few isolated showers expected Friday into Saturday over northern Florida. Rainfall totals will range from trace amounts to 0.15" in most areas. Dry weather will return Saturday evening and continue through Sunday. Winds will gust between 15 to 22 mph across southeast Florida and the Tampa Bay area through the end of January.



ARIZONA

Dry conditions with cold morning lows will continue through Friday, followed by a warming trend into the weekend. Yuma County valleys will see lows in the upper 20s to mid-30s, rising to the mid-30s to low 40s by Sunday. Wenden will hover in the mid-20s through Friday, warming to the mid-30s. Central Arizona and southeast California will see lows in the mid-30s to low 40s, increasing to the mid-40s by Sunday. Highs will range from the upper 50s to 60s today, climbing to the 70s to mid-80s by Sunday afternoon.

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

Freight Updates



Freight this week has faced transit issues due to ice and snow out west, and low temps affecting harvest in the southern growing regions from Arizona to Florida. Shipper delays and long wait times are going to be common. Expect weather to get better next week.



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

[full history](#) XLS

	01/13/25	01/20/25	01/27/25	Change from	
				week ago	year ago
U.S.	3.602	3.715	3.659	↓ -0.056	↓ -0.208
East Coast (PADD1)	3.718	3.820	3.805	↓ -0.015	↓ -0.238
New England (PADD1A)	3.821	3.944	3.961	↑ 0.017	↓ -0.328
Central Atlantic (PADD1B)	3.876	3.976	3.995	↑ 0.019	↓ -0.233
Lower Atlantic (PADD1C)	3.649	3.750	3.718	↓ -0.032	↓ -0.231
Midwest (PADD2)	3.532	3.648	3.568	↓ -0.080	↓ -0.136
Gulf Coast (PADD3)	3.321	3.455	3.378	↓ -0.077	↓ -0.266
Rocky Mountain (PADD4)	3.399	3.485	3.431	↓ -0.054	↓ -0.214
West Coast (PADD5)	4.213	4.302	4.274	↓ -0.028	↓ -0.234
West Coast less California	3.776	3.865	3.823	↓ -0.042	↓ -0.188
California	4.716	4.807	4.793	↓ -0.014	↓ -0.285

*prices include all taxes

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

Crop Updates



Cold temperatures in the Southwestern desert growing regions are forecast to continue throughout the week. These desert fields will see very cold morning temperatures with moderate lettuce ice across the region into Saturday before a warming trend begins next week. These very cold temperatures currently will slow growth rates to a crawl in the desert regions possibly causing some supply shortages down the road.

The leafy green fields will continue to show some wind and fringe burn, feathering/epidermal peeling, blister and discoloration in upcoming harvests. Along with blister and epidermal peel and blister you can expect to see lighter color and carton weights and smaller head size as growers trim out damaged outer leaves.

On the processing side extreme cold can cause physiological changes in the plants causing leaf sensitivity and weaker overall texture. This can result in increased mechanical damage and bruising during harvest and processing. Processed leafy green items will also likely see an increase in discoloration and breakdown showing up in the bag affecting shelf life. Spinach, tender leaf, and spring mix items tend to be most susceptible to weather fluctuations due to being harvested at a very young stage. The spring mix and tender leaf items will continue to show some yellowing, discoloration, and breakdown in the bag along with weaker texture and lesser shelf life due to the growing conditions in the region.

It is important to keep your rotations in check as overall quality and shelf life of many crops, especially processed items, will be challenged in the near term.



TIM LYNCH

QUALITY ASSURANCE MANAGER