

The Source

Commodity of the Month - Lemons



MARKET ALERTS

Asparagus: Mexican production is low due to seasonal factors, with Northern Sonora expected to remain minimal until warmer weather. Peruvian volumes are declining due to quality issues. The market is active due to reduced production from both regions.

Cauliflower: Production in Yuma is slow, with fair quality affected by mildew and slight discoloration. Supplies are extremely limited and are expected to remain tight through the weekend.

Cantaloupe: Offshore melons are facing supply challenges due to port delays and lower yields from Tropical Storm Sara, with prices rising through December. Relief from Honduras and Costa Rica is expected by year-end, while Mexican melons are limited in size and availability. The domestic melon season has ended.

Honeydew: Prices are elevated due to limited supply from lower yields after Tropical Storm Sara. Offshore supplies are expected later this month, and Mexican volumes are limited to larger fruit.

DECEMBER 18, 2024

CROP UPDATES

Onion quality is good, with tight white supplies. Carrot and berry supplies are improving, while potatoes are strong. Citrus is peaking on smaller navels, with light mandarins. Mexican avocado production is steady but impacted by rain. Row crops are light with cold weather causing quality issues. [Read more](#)

WEATHER

Arizona - A high-pressure ridge will stall over low-deserts, causing dry conditions with warmer temperatures. Lows will be in the upper 30s-40s, with highs in the mid 70s-low 80s. Moderate northerly winds.

California - High pressure will persist through Friday, bringing fair skies, cold mornings, and warm afternoons. Morning lows range from low to mid 30s, daytime highs reach 60s to 70s, and a low-pressure system arrives Friday night.

Florida - Showers are expected in northern Florida, central Florida, and southern Florida, with heavier rainfall possible. Conditions will dry out, cool, and have a chance of morning frost in northern Florida. Winds will increase.

Mexico - Seasonal temperatures and isolated showers are expected through December 22nd, with rain totals ranging from 0.02" to 0.20" and gusts up to 15 mph. Low temperatures will be in the low to upper 40s.

FREIGHT

This week we are seeing a decline in truck capacity heading in the holidays. Many suppliers are closed both Wednesday and Thursday. This will create an active truck market loading Friday and Saturday, the 27th and 28th. Plan ahead, and book in advanced.



IN PEAK SEASON



Save
the Date!



PRO*ACT
SUMMIT
2025

APRIL 14 - 16, 2025
MONTEREY, CA

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Commodity Updates



Apples

The apple market is expected to remain steady throughout December. Smaller foodservice sizes will continue to be limited across most varieties, as packouts are still peaking on larger sizes. This trend is particularly pronounced in Granny Smith and Fuji apples. However, with schools on holiday break, lighter demand should help stabilize pricing.

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



Asparagus



Mexican production remains low due to seasonal factors, with Northern Sonora starting at very low volumes that are expected to persist until the region warms. Peruvian volumes are also declining due to quality issues and seasonal transitions. Markets are extremely active due to reduced production from both Mexico and Peru.

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



Avocados

Markets are steady, with the size curve currently heavy on small fruit and tight on large fruit. Pricing is lower for small fruit, while large fruit remains in strong demand. As the fruit sizes up and harvests move to higher elevations towards the end of the year, the size curve is expected to shift. The industry anticipates good supplies from Mexico 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

Eastern bell pepper supply remains limited due to storm damage and cool weather, but improvement is expected next week. Coachella will transition to Mexico in 5-7 days as weather-related delays are resolved. Current weather conditions have resulted in smaller peppers, but supply is anticipated to improve soon.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

Peak volumes from Central Mexico and Baja are expected to arrive at distribution centers soon. This item will be highly promotable over the next several weeks, with loading options available in Texas and California.

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



Berries (Blueberries)

Strong fruit supplies are arriving from Central Mexico, Baja, and Peru. Demand remains light with schools on break and the upcoming holidays.

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



Berries (Raspberries)

Product volumes are increasing as more shipments begin crossing into the U.S. from Baja and Central Mexico.

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



Berries (Strawberries)

California continues to experience light volumes from Oxnard and Baja Mexico, though warmer temperatures are expected to improve yields heading into the weekend. Central Mexico is steadily increasing production, but demand remains light due to the holidays. Florida's season is showing more significant volumes, with steady growth anticipated through the end of December.

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

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

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Commodity Updates



Broccoli

Broccoli supplies remain strong this week, with excellent overall quality. The market is expected to stay steady through 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

Demand for Brussels sprouts remains strong, with quality expected to stay good heading into the weekend.

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



Carrots

Harvest is ongoing in the Bakersfield area for the Fall season and is expected to continue through February. Due to 60 days of 100+ degree temperatures this past summer, growers are anticipating a tight Fall season. Allocations may be necessary at some point as sizing is 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 production in Yuma is off to a slow start. Overall quality is fair, with reports of mildew and slight discoloration. Supplies are extremely limited and are expected to remain tight through the weekend.

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



Celery

Production levels are moderate as we approach the end of the holiday season. Supplies are currently lighter on larger sizes, a trend expected to continue for the next few weeks. After Christmas, production in Yuma is expected to ramp up with multiple suppliers. Additionally, value-added items in this commodity are currently experiencing price increases.

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, 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, while District 1 (San Joaquin Valley) has started off light 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)

Lime prices have stabilized, with fruit continuing to peak in larger sizes (110/150) and improved quality. High demand coupled with limited availability is expected to persist through January.

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



Citrus (Oranges)

Navels are performing well, with peak sizes at 138ct, 113ct, and 88ct. While markets are currently low on 138ct, they are expected to stabilize soon. As the season progresses, the peak sizing will shift toward 113ct and 88ct, while 72ct and larger sizes will remain tight for the foreseeable future. Gas times are around 24 hours, and Brix levels are in the 12-13 range. It's shaping up to be a strong year for foodservice, and domestic mandarins have also started.

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



Cucumber

Florida supply remains limited, with increased imports from Honduras expected by January. Mexican supply is transitioning from Sonora to Sinaloa, with rising volumes as more growers begin their harvests. The new crops are of high quality, while older plantings are showing signs of decline.

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

Florida eggplant supply is currently light, but improvements are expected soon. Coachella production is winding down, while Sinaloa's production is increasing, with greater availability anticipated by early December.

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



Garlic

Garlic quality is 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)

Some domestic red seedless grapes are still available in California, with shippers expecting to continue shipments through Christmas. Domestic supplies of green, black, and red globe varieties have finished. Imported reds and greens are arriving on both coasts, though arrivals are lighter than anticipated. Demand for greens will exceed supply until early January, and the spot market for reds will remain tight. The situation is expected to improve in the second half of January, with adequate supplies projected for February.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies and quality are expected to be strong this week, with the market remaining steady as we move into the weekend.

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



Kale

Kale supplies are expected to be abundant this week, presenting a great opportunity for promotion.

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

Steady production continues in the Yuma region, with ideal growing conditions and a surplus of production not seen in recent holiday seasons. Reports indicate good weights and quality, with no escalated pricing on any value-added items. This trend is expected to continue into the new year.

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

Steady production of romaine, as well as green and red leaf lettuce, continues from the Yuma region. However, butter lettuce will see lighter production for the next few weeks. There are no price escalations for value-added leaf products, and this is expected to continue into the new year. Good supplies of romaine hearts are also anticipated. Overall, the quality of all leaf items remains above average.

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



Lettuce Tender Leaf

Supplies and quality are expected to remain strong this week, with the market anticipated to stay steady as we head into the weekend.

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



Melon (Cantaloupe)



Offshore melons are currently facing challenges due to port delays, particularly affecting contracted business. Tropical Storm Sara has led to lower yields, putting added pressure on the market as growers strive to meet commitments. The market supply of melons is very limited, with triggered pricing implemented on some items, expected to persist through December. Relief from Honduras and Costa Rica is not expected until the end of the month or early next year. Mexican melons from Nogales are limited in both size and availability, and the domestic melon season has concluded.

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

Prices for honeydews are elevated due to limited supply. The November Tropical Storm Sara disrupted fields and infrastructure, resulting in lower yields on vessels. Additional offshore honeydew supplies are expected towards the end of the month, though they are not yet in transit. Mexican volumes are very limited and are primarily peaking on larger honeydews.

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



Melon (Watermelon)

Watermelon supplies are currently very limited as Northern Mexico suppliers wrap up, and production in Southern Mexico fields is just beginning. The East Coast and Georgia suppliers have been heavily 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

Supplies of both brown and white mushrooms are abundant and available for promotion.

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 pricing. White potatoes are in very tight supply. Overall, markets are steady and expected to remain stable until the next holiday. Lighter supplies are anticipated in the ID/OR region, while WA suppliers are seeing improvements. Transportation and railroad availability may be impacting markets in specific regions.

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

All major pear varieties are currently being packed in Washington, but it will be a tight year for pears, as the Washington crop is significantly down from last year's volumes. The market is firm and is expected to remain that way throughout the year. Bartletts are still a better value than Anjou pears, but this will only last until they finish, likely by the end of January.

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 maintaining 6-week averages while prioritizing contracted business. Market availability remains steady as suppliers prepare for 2025 contracts. Costa Rican pineapple supplies are improving, with quality expected to enhance following upcoming rainfall. Larger fruit remains scarce, but Mexican pineapples are more readily available and show improved quality.

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



Potatoes

The Idaho market is steady with strong availability and good to excellent quality as the holiday approaches. However, inclement weather in the Northwest is limiting truck supply, expected to decline through year-end. We recommend lead time to ensure orders are filled. Shippers are pulling smaller potatoes from storage to meet demand, and Washington is limited on small sizes. Sweet potato yields in North Carolina are lower year-over-year.

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



Squash

Florida has sufficient yellow and zucchini squash, though quality is variable. Nogales has moderate to substantial volumes, with Obregon leading production, offering promotable volumes and good overall quality.

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



Stone Fruit

Imported peaches and nectarines are expected to arrive on both coasts the week of 12/16, with light supplies primarily consisting of medium-sized fruit. Domestic Asian pears are nearly finished, with only a few smaller sizes remaining. Domestic kiwi shipments are strong, and the market remains steady.

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



Tomatoes

Florida has a limited tomato supply, with new crops expected after Christmas. Mexico's supply is currently light but improving, with Sinaloa's new crops expected to arrive by January. Grape and roma tomatoes are beginning to trickle in from Sinaloa, while round varieties are anticipated to start in early January.

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

Key Partners



Weather Updates



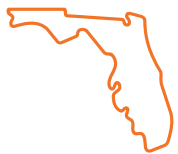
CALIFORNIA

High pressure will persist over the area through Friday, bringing fair skies, cold mornings, and warm afternoons. Morning lows will range from the low to mid 30s south of King City, and mid 30s to mid 40s elsewhere. Daytime highs will reach the low 60s to low 70s. A low-pressure system is expected to arrive Friday night, bringing light to moderate rain chances through Sunday, with totals ranging from $\frac{1}{4}$ " to $\frac{3}{4}$ ". Minimum temperatures will warm to the mid 30s to low 50s.



MEXICO

Seasonal temperatures and isolated showers are expected through December 22nd. Rain totals will generally range from 0.02" to 0.20" in most showers, with higher totals possible from thunderstorms, particularly over the weekend. Winds will gust up to 15 mph through December 20th. Low temperatures will be in the low to upper 40s today, mid 40s to low 50s tomorrow morning, and low to upper 40s from Friday through Sunday morning. Highs will range from the upper 60s to upper 70s throughout the weekend.



FLORIDA

Showers are expected today through Thursday, with rainfall totals ranging from 0.02" to 0.20" in northern Florida, 0.15" to 0.35" in central Florida, and 0.20" to 0.50" in southern Florida. Locally heavier rainfall is possible, especially in southern Florida. Conditions will dry out and cool significantly by Friday through Sunday, with a chance for morning frost in northern Florida over the weekend. Winds will gust up to 15 mph through tomorrow, increasing to 20-25 mph on Friday.



ARIZONA

A high-pressure ridge stalls over the low-deserts through the weekend producing dry conditions with warmer than normal temps prevailing. Morning lows will hover in the upper 30s-40s over Yuma Co. and central Arizona with mid 40s-low 50s in southeast CA. Mid-upper 30s in Wenden. High temps should be in the mid 70s-low 80s most fields through the period. Moderate northerly winds expected today and Thursday, decreasing Friday.

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

Freight Updates



This week we are seeing a decline in truck capacity heading in the holidays. Many suppliers are closed both Wednesday and Thursday. This will create an active truck market loading Friday and Saturday, the 27th and 28th. Plan ahead, and book in advanced.



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

full history

	12/02/24	12/09/24	12/16/24	Change from	
				week ago	year ago
U.S.	3.540	3.458	3.494	↑ 0.036	↓ -0.400
East Coast (PADD1)	3.597	3.535	3.575	↑ 0.040	↓ -0.394
New England (PADD1A)	3.773	3.755	3.754	↓ -0.001	↓ -0.608
Central Atlantic (PADD1B)	3.793	3.750	3.761	↑ 0.011	↓ -0.575
Lower Atlantic (PADD1C)	3.507	3.432	3.487	↑ 0.055	↓ -0.306
Midwest (PADD2)	3.521	3.425	3.450	↑ 0.025	↓ -0.356
Gulf Coast (PADD3)	3.227	3.130	3.190	↑ 0.060	↓ -0.379
Rocky Mountain (PADD4)	3.431	3.329	3.357	↑ 0.028	↓ -0.576
West Coast (PADD5)	4.164	4.119	4.130	↑ 0.011	↓ -0.525
West Coast less California	3.739	3.682	3.726	↑ 0.044	↓ -0.427
California	4.652	4.623	4.597	↓ -0.026	↓ -0.634

*prices include all taxes

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

Crop Updates



Onions: Quality is good across all regions, with increased demand post-holiday. Yellow onions are mostly large sizes, while red onions are in better shape with larger sizing. White onions are in lighter supply with strong demand.



Carrots: California's carrot supplies remain tight due to hot temperatures affecting sizing and yields. Southern Georgia's harvests are also delayed by Hurricane Helene. Both regions expect improvements in the coming weeks.



Potatoes: Idaho has a balanced range of sizes with excellent quality. Washington's profile leans toward medium/small sizes with excellent quality. Nevada's new lots are producing larger sizing, and new colored potatoes are available with above-average sizing.

Citrus: Navel oranges are peaking on smaller sizes; larger sizes will remain tight. Domestic mandarins are light, and Cara Caras and Blood Oranges are expected in December. Lemon supplies will peak in D3, and Desert Rio grapefruit is available in very light volumes.



Avocados: Mexican production remains steady with a heavy small fruit size curve. Rain is causing some #2 fruit and lenticel spotting. Columbia's season is underway, but volumes are limited. Avocado Seed Weevil detection is impacting the crop in Mexico.

Berries: Oxnard strawberry volume is down due to cooler weather, with Baja and Central Mexico gradually increasing. Blackberry and raspberry supplies are improving from Mexico. Blueberries are in better shape with increased production from Central Mexico and Peru. Florida strawberries are improving in quality post-storm.



Row Crops: Lettuce and romaine are seeing improved head density, but cold temperatures and frost will slow growth and cause some quality issues. Broccoli, cauliflower, and cabbage remain light as we approach the holidays. Processed items may show more discoloration and breakdown.

TIM LYNCH

QUALITY ASSURANCE MANAGER