

# The Source

Commodity of the Month - Lemons



## MARKET ALERTS

**Asparagus:** Mexican production is limited by cold temperatures, Peruvian volumes are decreasing due to quality issues, and markets are expected to stay elevated for the next few weeks.

**Celery:** Supplies of larger sizes remain limited, but production in Yuma has started, with improved availability expected, while value-added items continue to face price escalations.

**Grapes (Red/Green):** Domestic red seedless grapes are available through Christmas, with tight supplies of greens and reds until January, but conditions should improve by mid-January.

**Cantaloupe:** Offshore melon markets are impacted by port delays, Tropical Storm Sara, and limited supply, with relief from Honduras and Costa Rica not expected until late January or early February, while Mexican melons are also limited and the domestic season has ended.

**Honeydew:** Prices are elevated due to limited supply, with further pressure from reduced port hours, delayed container ETAs, and the Mexico border closure for commercial crossings during the holiday

**Pineapples:** Suppliers are prioritizing contracted business while preparing for 2025 contracts, with limited Costa Rican pineapple supply due to heavy rains, causing larger sizes to command a premium, and improved-quality Mexican pineapples more readily available.

**Tomatoes:** The round tomato market is tight, with limited Florida volumes, premium-priced Mexican large fruit, and increasing Roma supplies facing quality-driven price fluctuations.

## DECEMBER 31, 2024

## CROP UPDATES

As the produce industry normalizes post-holidays, a potential January 15 port strike threatens to disrupt imports, tighten supplies, and raise costs for key commodities. Close collaboration and proactive communication are crucial to maintaining supply chain stability. [Read more](#)

## WEATHER

**Arizona** - A slight cooling is expected Monday with morning lows in the mid-30s to mid-40s, a risk of lettuce icing in some valleys, and highs in the low 70s, rising to the mid-70s by Thursday under a stagnant ridge pattern.

**California** - A cold high-pressure system will bring morning lows in the upper 20s to low 30s, with daytime highs in the mid 50s to upper 60s. A weak low-pressure system may bring light rain on Friday, with totals under ¼ inch.

**Florida** - A series of cold fronts will bring cooler temperatures and a chance of frost in Northern Florida by week's end, with dry weather and gusty winds through January 3rd.

**Mexico** - Cool mornings will persist through midweek, with slightly warmer temperatures by week's end, and no rain expected.

## FREIGHT

Business is picking up as the holiday season ends. Truck demand will rise, but supply remains steady, with the freight market expected to be very active due to New Year celebrations.



## IN PEAK SEASON



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# Commodity Updates



## Apples

The apple market is expected to remain steady throughout December. Smaller foodservice sizes will be tight across most varieties, with pack-outs heavily favoring larger sizes, particularly in Granny Smith and Fuji apples. With schools on holiday break, lighter demand should help stabilize prices.

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



## Asparagus



Mexican production remains extremely limited due to cold temperatures, resulting in reduced yields, though improvements are expected in the coming weeks. Peruvian volumes continue to decline due to quality challenges and seasonality. Markets are likely to remain elevated for at least the next few weeks.

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



## Avocados

Markets remain steady, with a size curve favoring smaller fruit, which is more readily available, while larger fruit remains limited and commands higher prices. As harvests transition to higher elevations and fruit on the trees continues to size up, availability of larger sizes is expected to improve. Strong supplies from Mexico are anticipated, offering excellent promotional opportunities for smaller fruit.

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



## Bell Peppers

Green and red bell pepper markets are seeing high prices as production shifts to southern regions. Mexico's supply is limited due to weather conditions, while warmer temperatures in South Florida are improving volumes. With California's season winding down and tight supplies in Mexico and Texas, prices remain elevated.

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

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# Commodity Updates



## Berries (Blackberries)

Blackberries remain in strong supply from both Central Mexico and Baja. Overall quality is good, though it may vary slightly by region.

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



## Berries (Blueberries)

Steady supplies continue to flow into the U.S. from Peru and Central Mexico, with light volumes also arriving from Baja. The market is expected to remain stable as we move into January. While port strikes have raised some concerns for certain shippers, many key arrival ports remain unaffected, providing importers with alternative options for moving containers as needed.

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



## Berries (Raspberries)

Steady supplies continue to arrive from Central Mexico and Baja, and we expect this trend to persist into the New Year and for the coming weeks.

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



## Berries (Strawberries)

We're seeing increased volume from several regions during a typically low-demand period. Central Mexico and Florida are ramping up production, while Oxnard and Baja are starting to supply after recent cold weather delayed crops. Abundant supplies are expected through January, weather permitting.

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

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

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Only the Finest Berries™



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# Commodity Updates



## Broccoli

Broccoli supplies are steadily improving, with crews addressing minor green shading variations and occasional mechanical damage. Ample availability is expected to continue into next week.

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



## Brussel Sprouts

Brussels sprout demand remains steady, supported by ample supplies. Quality is expected to stay strong through the weekend.

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



## Carrots

Harvest in the Bakersfield area is ongoing for the fall season and will continue through February. This summer's 60 days of 100+ degree temperatures have resulted in a challenging season, with smaller sizing and tighter supplies. Allocations may become necessary as the season progresses.

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 improving across all sizes, and a steady market with good availability is expected through at least next week.

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



## Celery



Supplies of larger sizes for this commodity remain limited throughout the week. Production in Yuma has started, with improved availability expected in the coming weeks. Value-added items remain under escalation.

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 peak sizing on 56ct and smaller, shipping from Riverside and the San Joaquin Valley.

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

Markets are steady overall. District 3 (CA Desert/AZ) is performing well and will continue through February, while District 1 (San Joaquin Valley) has started off light but will ramp up in the coming weeks.

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

The market remains strong, with 110/150 count fruit leading in availability. Smaller fruit is limited, resulting in higher prices compared to larger fruit. As January approaches, costs are expected to rise, and supplies may become even tighter.

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

Navel oranges are performing well, with peak sizes at 138ct, 113ct, and 88ct. While markets for 138ct are currently low, they are expected to stabilize soon. As the season progresses, peak sizing will shift to the 113ct and 88ct sizes, with 72ct and larger sizes remaining tight. Gas times are minimal, around 24 hours if any. Brix levels are strong at 12-13, signaling a great season for foodservice. Domestic mandarins have also started shipping.

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

There is strong supply and availability across the board.

Commodity/Region	Supply	Price	Quality
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Florida (Nov. - May)	Light	\$\$\$	Fair
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Mexico (November - May)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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# Commodity Updates



## Eggplant

There is strong overall supply and availability, with promotable volumes ready for distribution.

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



Domestic red seedless grapes are still available in California, with shipments anticipated through Christmas. Domestic greens, blacks, and red globes have concluded for the season. Imported reds and greens are arriving on both coasts, though in lower volumes than expected. Green grapes will remain in a demand-exceeds-supply situation until early January, while the spot market for reds is tight. Conditions are expected to improve by mid-January, with adequate supplies anticipated by 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 remain strong this week, with a steady market as we approach the weekend.

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



## Kale

Kale supplies and quality are expected to remain strong this week and next, providing excellent promotion opportunities.

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

Shippers are accommodating volume orders for this commodity, making it an excellent opportunity to promote heavily this week. Quality remains strong, with favorable reports on texture and weights. Additionally, all escalations on value-added items have been lifted.

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, green leaf, and red leaf production will remain strong throughout the week, with no price escalations on value-added leaf products. Moderate to good availability of romaine hearts is anticipated, and overall quality for all leaf items is expected to stay above average.

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



## Lettuce Tender Leaf

Supplies and quality of all tender leaf items remain strong this week, with the market expected to stay steady through 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 melon markets are facing challenges due to port delays, limited hours, and potential strikes. Tropical Storm Sara has also reduced yields, putting further pressure on supply. With limited market availability and triggered pricing in effect, relief from Honduras and Costa Rica is not expected until late January or early February. Mexican melons from Nogales are also limited in size and supply, and the domestic season has ended.

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. The upcoming holiday has further pressured the market, with reduced port hours and delayed container ETAs. Additionally, the Mexico border will be closed for commercial crossings during the holiday.

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



## Melon (Watermelon)

Watermelon supplies are extremely limited as Northern Mexico suppliers wind down and Southern Mexico production remains constrained. The East Coast and Georgia suppliers have been heavily affected by Hurricane Milton, shifting demand to the West Coast. Offshore melon arrivals in Florida are expected in week 2 of January.

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



## Mushroom

Supplies currently exceed demand, but growers have limited excess product available after the holiday demand.

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 varieties. Markets remain firm and are expected to rise further after the holidays.

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 now being packed in Washington, but this will be a tight year due to a significant decline in the crop compared to last year's volumes. The market remains firm and is expected to stay that way throughout the year. Bartletts offer better value than Anjou, but this will change once the Bartlett season ends at 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

**ALERT**

Suppliers are maintaining 6-week averages and prioritizing contracted business, while preparing for 2025 contracts. Costa Rican pineapple supplies are limited due to heavy rains in the tropics, causing larger sizes to command a premium. Mexican pineapples are more readily available with improved quality.

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



## Potatoes

The ID market is steady as the holiday approaches, with 100ct potatoes limited. Availability and quality remain strong. Inclement weather in the PNW is impacting truck supply, expected to decline through year-end. Lead time is recommended for order fulfillment. Smaller potatoes are being pulled from storage to meet demand, with limited supplies from WA. 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

There is a strong supply coming from Nogales and Florida, with promotable volumes available.

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



## Stone Fruit

Imported peaches and nectarines have started arriving on both coasts, with light supplies primarily consisting of medium-sized volumes. Domestic Asian pears are nearly finished, with only a few smaller sizes remaining. Domestic kiwi is shipping in good volume, and the market remains steady.

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



## Tomatoes

**ALERT**

The round tomato market remains tight, with demand outpacing supply. Florida's volumes are currently limited but should improve by early January, while larger fruit from Mexico is priced at a premium. Roma tomato supplies are increasing, though Mexico's production is facing quality-driven price fluctuations, with top-quality fruit commanding higher prices.

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

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

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# Weather Updates



## CALIFORNIA

A cold high-pressure system will settle over the region starting Monday, lasting through mid-week. Morning lows on Monday will dip into the upper 20s to low 30s south of King City, with mid 30s to low 40s elsewhere. By mid-week, temperatures will drop to the low-mid 20s south of King City, upper 20s to low 30s in the Santa Clara Valley, Soledad, and King City, and mid-upper 30s closer to the coast. Daytime highs will remain in the mid 50s to upper 60s throughout the week. A weak low-pressure system will bring a slight chance of rain on Friday, with totals expected to be less than ¼ inch.



## MEXICO

Cool mornings will continue through midweek, with slightly warmer temperatures later in the week. Light patchy frost is possible in wind-sheltered areas through Wednesday. Daytime temperatures will remain steady, with highs in the low 70s to near 80 by week's end. Lows will range from the low 30s to low 40s through Tuesday, mid 30s to mid 40s on Wednesday, and low to upper 40s Thursday and Friday. No rain is expected over the next five days.



## FLORIDA

A series of cold fronts will bring cooler temperatures by midweek, with a chance of frost in Northern Florida by week's end. Expect mostly dry weather through Jan 3rd, with winds gusting 15-20 mph through the start of the month.



## ARIZONA

A slight cooling is expected on Monday as high pressure weakens and winds subside. Morning lows will range from the mid-30s to upper 30s in most of Yuma County, with low to mid-40s elsewhere. There's a risk of lettuce icing in Dome and Mohawk Valleys through the week, with light icing possible in Yuma Valley on Tuesday. Highs will be in the low 70s for most fields, with little change expected throughout the week. By Thursday and Friday, temperatures may reach the mid to upper 70s under a stagnant ridge pattern.

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



# Freight Updates



The pace of business is picking up this week with many preparing for the holidays end. We expect to see an uptick in demand for trucks, and are confident supplies will be good. Being several nationalities tend to celebrate the New Year, we expect the freight market to be very active.



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

[full history](#) XLS

	12/16/24	12/23/24	12/30/24	Change from	
				week ago	year ago
U.S.	3.494	3.476	3.503	↑ 0.027	↓ -0.373
East Coast (PADD1)	3.575	3.568	3.587	↑ 0.019	↓ -0.415
New England (PADD1A)	3.754	3.757	3.753	↓ -0.004	↓ -0.581
Central Atlantic (PADD1B)	3.761	3.763	3.774	↑ 0.011	↓ -0.530
Lower Atlantic (PADD1C)	3.487	3.476	3.501	↑ 0.025	↓ -0.357
Midwest (PADD2)	3.450	3.449	3.469	↑ 0.020	↓ -0.281
Gulf Coast (PADD3)	3.190	3.154	3.196	↑ 0.042	↓ -0.369
Rocky Mountain (PADD4)	3.357	3.328	3.370	↑ 0.042	↓ -0.517
West Coast (PADD5)	4.130	4.079	4.110	↑ 0.031	↓ -0.508
West Coast less California	3.726	3.645	3.705	↑ 0.060	↓ -0.421
California	4.597	4.580	4.576	↓ -0.004	↓ -0.608

*\*prices include all taxes*

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

# Crop Updates



As we move past the holidays, which fell in the middle of the week and disrupted everyday routines, the produce industry is transitioning to a more regular schedule. However, this sense of normalcy may be short-lived as we brace for the potential impact of a looming port strike that could have widespread effects on imported commodities.

The current contract extension between the International Longshoremen's Association (ILA) and the U.S. Maritime Alliance (USMX) expires at midnight on January 15, 2025.

Negotiations collapsed in November, and there are no formal plans to reconvene, increasing the likelihood of a strike. Should it occur, it would disrupt operations at 36 container ports along the East and Gulf Coasts, from Texas to Maine.

For the produce industry, the timing couldn't be worse. Grapes from Chile and Peru and melons from Central America rely heavily on these ports for distribution across the U.S. Any delays or disruptions would continue to tighten supplies and drive up costs when the industry is still recovering from holiday slowdowns.

Importers and distributors are already facing challenges from recent weather events impacting domestic crops. Grapes, expected to ramp up in volume through January, could see delays that compress the supply chain, leading to spot shortages and elevated prices. Similarly, melons could face logistical bottlenecks that disrupt their timely deliveries.

To mitigate the impact, closely coordinating with logistics partners will be key for minimizing disruptions. It's also crucial to communicate transparently with customers about potential challenges and adjustments to supply schedules.

Beyond immediate logistics, the industry must remain vigilant and advocate for a resolution. These efforts are essential for maintaining the integrity of the supply chain and ensuring that fresh produce remains accessible to consumers nationwide.

While the New Year promises a fresh start, the looming port strike reminds us of the fragile balance within the produce supply chain. As an industry, our ability to adapt and collaborate will determine how effectively we navigate these challenges and continue delivering the quality and consistency our customers expect.



**JOEY PIEDIMONTE**  
**SOURCING MANAGER**