

The Source

Commodity of the Month - Strawberries

Driscoll's
Only the Finest Berries™

MARKET ALERTS

Avocados: Markets remain steady at high levels for 48ct and larger sizes, with some relief for 60ct and 70ct. The size structure remains consistent, with smaller sizes peaking and larger sizes priced higher. California's season has started lightly due to tight supply from Mexico, with a ramp-up expected in late February/early March.

Blackberries: Supplies from Central Mexico remain tight due to cold temperatures and the Mexican National holiday, which slowed production. Improved volumes are expected later this week.

Raspberries: Production is limited due to cold temperatures in the growing regions, resulting in a demand-exceeds-supply situation.

Strawberries: Production is recovering from weather impacts in California, Baja, and Central Mexico, with improvements expected by week's end. Florida is facing Valentine's Day demand, but availability should improve next week.

Eggplant: Supplies remain tight after a recent peak in production, with significant volume increases not expected until California's season starts in April/May. Florida production is light but steady.

Cantaloupe: Offshore melon supply remains tight due to improving yields, port delays, and quality concerns. Triggered pricing is easing, while Mexican cantaloupes from Nogales are in short supply.

Honeydew: The market is normalizing as production from Mexico and Honduras increases, boosting supply.

FEBRUARY 5, 2025

CROP UPDATES

Herb production is limited due to wildfires and cold weather, especially basil, tarragon, and sage. East Coast port delays are also impacting supplies. Weather will influence recovery, and potential tariffs on Canadian and Mexican produce remain a concern. [Read more](#)

WEATHER

Arizona - A high-pressure ridge will keep temperatures above average and dry through the weekend, with highs in the 70s to 80s, cooling to the 60s to 70s by Sunday. Morning lows will be in the 40s.

California - A low-pressure system will bring up to ¼ inch of rain today, with morning lows in the 40s to 50s and highs in the 50s to 60s. A new system will arrive Thursday, bringing light to moderate rain and gusty winds until Friday. Saturday will see clearing skies and cooler temperatures, with lows in the 20s to 40s.

Florida - Warm, dry weather is expected across Florida with minor changes. Winds will gust 15-20 mph through Thursday. Northern Florida will see highs in the 70s to 80s, and lows in the 50s to 60s, while central and southern Florida will have highs in the 70s to low 80s and lows in the upper 50s to 60s.

Mexico - Warm temperatures will continue over the next five days with lows in the low 40s to low 50s and highs in the mid 70s to mid 80s. No rain is expected.

FREIGHT

Wet weather will impact driving conditions out west this week, but no snow is expected over the passes. Conditions across the U.S. remain stable, with clear roads south of I-40.

PRO*FRESH
LOGISTICS

IN PEAK SEASON

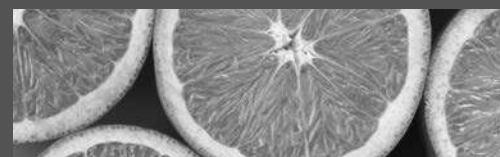


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Commodity Updates



Apples

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

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



Asparagus

Asparagus supplies are steadily improving on both coasts, with Mexico now producing Jumbo sizes along with all other grades. Expect the market to adjust lower in the coming weeks.

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



Avocados

ALERT

Markets remain steady at high levels for 48ct and larger sizes, while 60ct and 70ct are starting to see some relief. The size structure is consistent, with 60ct and smaller peaking, and 48ct and larger commanding higher prices. California has begun its season lightly, primarily due to tight fruit supply from Mexico and the drive to capture higher prices. The California season is expected to ramp up in late February/early March.

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



Bell Peppers

Bell peppers are abundant in both western and eastern regions, thanks to warmer temperatures in Sinaloa, Mexico, and Florida. Colored bell peppers are also in good supply, with steady markets heading into the weekend.

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 remain tight from Central Mexico, impacted by cold temperatures and last Monday's Mexican National holiday, which slowed production early in the week. However, improved volumes are expected later this week.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Light	\$\$\$	Good
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Berries (Blueberries)

Product continues to arrive from Chile and Central Mexico, while Baja, Mexico has started light harvesting, crossing through Otay Mesa and San Diego. With the Peruvian season winding down, markets are firming up. However, better production is expected from Mexico in the coming weeks as temperatures gradually rise in key growing regions.

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

ALERT

Production remains highly limited due to cold temperatures in the growing regions, creating a demand-exceeds-supply situation.

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

ALERT

Strawberry production continues to recover from cool temperatures and adverse weather in California and Baja, MX, while Central Mexico has also felt the impact of cooler conditions. However, improvements are expected by the end of the week as the effects of last weekend's Mexican holiday and short-term labor shortages due to protests subside. Florida is gradually warming up but is struggling to keep up with heavy Valentine's Day demand. Availability should improve next week as demand eases.

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

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Commodity Updates



Broccoli

Broccoli supplies remain steady as warmer temperatures in Yuma support production. Expect the market to hold firm with consistent quality heading into next week.

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

Domestic production has shifted to Oxnard, while improved yields in Northern Mexico have strengthened volume in the category. Quality remains high, though some elongated stems/cores have been observed in Mexican product. With steady, uninterrupted supplies, now is a great time to promote both VA and 25lb bulk pack items.

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



Carrots

Harvesting is ongoing in the Bakersfield area and will continue through February before moving to the Imperial Valley growing region, where the outlook remains positive. Additionally, Grimmway's Lake Park, GA production is set to ramp up in the coming weeks.

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

Supplies are improving with warmer weather, while the market remains steady across all regions. Expect stable conditions to continue into next week.

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



Celery

This market remains firm, with moderate supplies from Santa Maria/Oxnard meeting demand. Yuma production remains light, but larger sizes are more readily available compared to last week's production. Overall, the quality of this commodity remains excellent across the industry.

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

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

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Commodity Updates



Citrus (Grapefruit)

Star Rubies are available, with the peak size being 56ct and smaller, and are being shipped from both Riverside and the San Joaquin Valley.

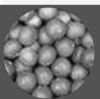
Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Good
Texas (October - April)	Light	\$\$\$	Good



Citrus (Lemons)

Markets remain steady across the board. District 3 (CA Desert/AZ) is performing well and will continue through February. Meanwhile, 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)

Market volatility is expected to persist into February, with upcoming harvests producing smaller limes and 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, but are trending towards larger sizes. Prices are rising for smaller oranges, and as the season progresses, we expect the peak sizing to shift to 113ct/88ct. Brix levels are currently in the 13 range.

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



Cucumber

Good supplies are available, particularly in the smaller sizes coming from Mexico, with excellent quality being reported.

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

ALERT

Supplies remain tight as growers have moved past a recent peak in production from a few weeks ago. Volume is not expected to rise significantly again until California begins in April/May. Florida production remains light but steady.

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



Garlic

Garlic quality is exceptional, and supplies are expected to remain 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 lower retail demand due to concerns over a potential port strike. This decline in demand has led to a drop in spot market prices. As a result, shippers are focused on regaining momentum and are expecting a sharp increase in volume throughout 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, with the market expected to stay steady heading into next week.

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



Kale

Processed kale supplies in Yuma remain limited due to slower growth and quality issues from recent cooler temperatures. However, supplies are expected to improve next week as warmer weather takes effect.

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

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

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Commodity Updates



Lettuce Iceberg

This market started the week with lighter availability, but overall, it's becoming more active. Moderate production is expected throughout the week, with favorable weather conditions supporting stronger supply next week. Weights are expected to range from 39-44 pounds. While some misshapen heads and slight outer leaf discoloration are still being seen, overall quality remains above average with multiple shippers.

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

Steady supplies of romaine and green and red leaf are expected from Yuma this week, with butter lettuce remaining limited. Some blister and peel have been observed upon arrival, but overall, quality continues to be above average. Shippers are passing on acreage where damage occurred, and romaine heart production is stronger this week.

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

Arugula is currently the most limited tender leaf item, with cooler temperatures recently slowing growth and impacting quality, leading to lower production. However, with warmer temperatures expected over the weekend, arugula supplies are anticipated to slowly improve.

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

ALERT

Offshore melons are still experiencing a demand-exceeds-supply situation. While yields are improving, availability remains limited. Port delays continue to affect fruit arrival times, making market availability unpredictable. Quality issues may arise due to extended time on the water. Triggered pricing remains in effect but is starting to ease. Additionally, Mexican cantaloupes from Nogales are extremely limited.

Commodity/Region	Supply	Price	Quality
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Central America (December - May)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Melon (Honeydew)

ALERT

The Honeydew market is beginning to normalize as more fruit becomes available. Increased production from Mexico and Honduras is helping to boost supply.

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

Watermelon FOB prices are dropping as inventories build in the Nogales and Florida regions. Demand remains light, but crossings have improved, helping to stabilize the market.

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

Promotable volumes are available across the country.

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

Demand remains strong, with prices beginning to normalize. The storage crop quality is excellent, and there is a good supply of both Red and Yellow Onions. However, White Onion supplies are currently lower.

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



Pears

Pears remain in tight supply and are expected to stay that way until mid-July, when California's new crop of Bartletts arrives. The Washington crop is down 25-50%, depending on the location and variety. Bartletts are winding down and should be nearly finished by February, while Bosc has seen the most significant decrease in volume and will experience demand exceeding supply until the new crop. Anjou is the primary variety available now and will likely see rising prices as the year progresses.

Commodity/Region	Supply	Price	Quality
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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

The pineapple market is currently experiencing strong demand for Costa Rican pineapples, with contracted business remaining a top priority. Suppliers are increasingly focusing on securing 2025 contracts. Due to lower yields caused by heavier rainfall, pineapples are expected to be limited until mid-April. Crownless pineapples remain a key focus but are more difficult to find.

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



Potatoes

The market remains steady this week, with stable pricing across the board. Distributors are now seeking DLVD pricing over FOB pricing. Freight prices are beginning to stabilize as road conditions improve. Additionally, February is celebrated as Idaho Potatoes Lovers Month!

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



Squash

Green squash is abundant in both California and Florida, while yellow squash is experiencing slightly lower volume. However, it is expected to catch up to zucchini production levels within the next week or two.

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 volume expected to improve as we head into February. Domestic Asian pears are nearly finished, but imported Asian pears should start arriving in about 10 days. Domestic kiwi is shipping in good volume, and the market has stabilized at its current level.

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



Tomatoes

Tomatoes remain steady from both Mexico and Florida, with good promotable volumes available. The quality of the fresh fruit continues to be excellent.

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

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

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Weather Updates



CALIFORNIA

A low-pressure system will move out of the region this morning, bringing up to $\frac{1}{4}$ inch of rainfall by midday. Morning lows will be in the mid 40s to low 50s in the Santa Ynez Valley and Cuyama, with daytime highs ranging from the low 50s to low 60s. The next system is expected to arrive just before sunrise on Thursday, bringing light to moderate rainfall through Friday, with rain totals in the tenth to $\frac{3}{4}$ inch range and wind gusts up to 35 mph. As skies clear on Saturday, cool high pressure will settle in, dropping min temps to the mid 20s to mid 30s in Santa Ynez Valley and Cuyama, and mid 30s to low 40s elsewhere.



MEXICO

Expect minimal changes over the next five days, with warm temperatures continuing. Lows will range from the low 40s to low 50s through Friday, and mid 40s to low 50s over the weekend. Highs will reach the mid 70s to mid 80s most days through the weekend, with no rain expected during this period.



FLORIDA

Expect warm, dry weather and minor day-to-day changes over the next five days across the Florida Peninsula. Winds will gust 15-20 mph through Thursday around Tampa Bay and southeast Florida. Northern Florida will see highs in the mid 70s to near 80 with lows in the low 50s to near 60 through Saturday. Central and southern Florida will reach mid 70s to low 80s in the afternoon, with upper 50s to upper 60s for lows through Saturday morning.



ARIZONA

A stalled high-pressure ridge will maintain above-average temperatures and dry conditions through the weekend, though with a gradual cooling trend. Expect highs in the mid 70s to low 80s today and tomorrow, cooling to the upper 60s to mid 70s by Sunday. Morning lows will range from the 40s across most fields throughout the period.

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

Freight Updates



This week we will see a very active weather forecast out west creating wet weather driving conditions. Despite the impending rain, we expect no snow over the passes. Driving conditions look to remain stable across the US, for the most part, and anything south of I-40 will remain clear.



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

full history XLS

	01/20/25	01/27/25	02/03/25	Change from	
				week ago	year ago
U.S.	3.715	3.659	3.660	↑ 0.001	↓ -0.239
East Coast (PADD1)	3.820	3.805	3.778	↓ -0.027	↓ -0.265
New England (PADD1A)	3.944	3.961	3.968	↑ 0.007	↓ -0.356
Central Atlantic (PADD1B)	3.976	3.995	3.986	↓ -0.009	↓ -0.289
Lower Atlantic (PADD1C)	3.750	3.718	3.682	↓ -0.036	↓ -0.247
Midwest (PADD2)	3.648	3.568	3.568	0.000	↓ -0.170
Gulf Coast (PADD3)	3.455	3.378	3.395	↑ 0.017	↓ -0.307
Rocky Mountain (PADD4)	3.485	3.431	3.471	↑ 0.040	↓ -0.179
West Coast (PADD5)	4.302	4.274	4.289	↑ 0.015	↓ -0.262
West Coast less California	3.865	3.823	3.857	↑ 0.034	↓ -0.197
California	4.807	4.793	4.787	↓ -0.006	↓ -0.334

**prices include all taxes*

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



Crop Updates

Temperatures have returned to seasonal averages in Northern Mexico and the Southwestern desert regions following weeks of cold temperatures across the region. In early January hurricane-force winds sparked extensive wildfires in Southern California and Northern Baja that severely impacted herb production from these regions. The strong winds and extended cold temperatures have reduced supplies of most herbs, especially basil followed by tarragon and sage. A couple of low-pressure systems will bring slightly cooler temperatures and light precipitation to the region through the weekend followed by seasonal temperatures and dry conditions next week. Upcoming availability will depend on how quickly these crops recover in the warming temperatures expected next week. Add to this, logistical challenges at the ports in the East Coast limiting imported herb supplies from Central America. Upcoming weather patterns will play a pivotal role in herb production out west as we move through February. Overall supplies look to remain light for the near term.

There remains plenty of uncertainty regarding the potential tariffs on Canada and Mexico that have been placed on a 30-day pause by the Trump administration until the end of February. Given the numerous fruits and vegetables that may be impacted by these potential tariffs, the produce industry is justifiably concerned as negotiations continue between officials.



TIM LYNCH

QUALITY ASSURANCE MANAGER