

The Source

Commodity of the Month - Strawberries

Driscoll's
Only the Finest Berries™

MARKET ALERTS

Raspberries: The market remains firm as Mexican customs system updates cause export documentation delays, forcing manual processing. While production is steady, logistical challenges persist.

Strawberries: Strawberry supplies remain tight due to high Valentine's Day demand. While demand may ease post-holiday, production challenges persist, especially with rain in California. Prices may soften slightly, but supply constraints could prevent typical market saturation.

Oranges: Peak sizes are now 88ct, with stable markets on smaller sizes. Good deals remain on 88ct and smaller, with Brix at 13. Valencia oranges arrive late May to early June.

Cantaloupe: Cantaloupe prices remain high, but Guatemala's upcoming spring harvest should improve supply.

Honeydew: Nogales honeydews are available with larger sizes prevailing, while offshore supplies are improving across major ports.

Watermelon: Nogales watermelons will see steady demand due to reduced acreage, while strong offshore supplies help cover gaps.

FEBRUARY 12, 2025

CROP UPDATES

Pacific storms are bringing strong winds and rain to California, causing defects in iceberg, romaine, and leafy greens, including blistering and discoloration. Increased insect pressure is affecting lettuce crops, while colder temperatures are causing yellowing and weaker texture in spring mix and tender leaf items. As a result, shelf life and quality are expected to be impacted. [Read more](#)

WEATHER

Arizona - Drier conditions are expected as low-pressure systems approach. Central Arizona will see minimal rain today, with light showers Thursday and moisture shifting north of I-10 by Friday. Temps will range from the 30s to 40s, warming to the 40s to 50s by Friday, then cooling over the weekend.

California - Light to moderate showers today, with heavier storms expected tonight through Friday, totaling 1½" to 4". Morning lows in the 30s to 40s, highs in the 50s to 60s. Clear skies Saturday, with cooler lows and warmer highs.

Florida - Warm temperatures will continue through Thursday, with showers in northern Florida lasting into Friday. Cooler weather arrives Friday, followed by dry warmth Saturday and more showers Sunday. Winds will gust 20-30 mph through February 14th.

Mexico - Warm temperatures in Central Mexico will continue through February 16th, with highs in the 70s to 80s and morning lows in the 40s to 50s. Dry conditions will persist, with light showers possible.

FREIGHT

Rain and snow in the West will affect driving between California's Central Valley and Desert Regions. Florida's truck market is tight with Fresh Flower loads, and US/Mexico border delays are expected due to political issues.

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LOGISTICS

IN PEAK SEASON



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Commodity Updates



Apples

The apple market is expected to stay largely stable through February, except for the Honeycrisp variety, which is down about 38% from last year, driving prices higher. Washington's crop is leaning toward larger sizes, limiting the availability of smaller foodservice sizes, particularly for Granny Smith and Fuji apples.

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



Asparagus

Asparagus production in Caborca is ramping up, with increased supplies, including 28 lb cases. Mexican volume is expected to remain strong across all sizes, including Jumbo, throughout February. Meanwhile, Peruvian supplies are lower due to seasonal temperature impacts.

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



Avocados

The market remains steady at elevated levels for 48ct and larger sizes. While there was initial relief on smaller sizes, prices have begun to rise again as Mexico scales back harvests to capture higher prices. Size structure remains consistent, with smaller sizes peaking around 60ct, while 48ct and larger continue to command higher prices. California's harvest has started slowly, primarily due to tight supplies from Mexico and efforts to capture premium pricing. California production is expected to ramp up significantly in late February and early March.

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



Bell Peppers

Strong supplies continue from Mexico, though past peak production. In Florida, volume and quality are expected to remain moderate until new spring crops begin in March. Colored bell peppers remain tight, especially yellow and orange, while red peppers are more readily available. Canadian production is set to start in early March.

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

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

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Commodity Updates



Berries (Blackberries)

The market remains firm due to delayed transfer trucks from Central Mexico. While production levels are stable, logistical challenges persist as Mexican customs officials update computer systems daily, causing disruptions in export documentation. With the process now being handled manually, delays are inevitable.

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



Berries (Blueberries)

Markets are firm for this item entering the U.S. from Chile, Baja, and Central Mexico. Limited production has also begun in Central California. Product is available for loading in California, Texas, New Jersey, and Florida.

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



Berries (Raspberries)

ALERT

The market remains firm due to delayed transfer trucks from Central Mexico. While production levels are unchanged, logistical challenges persist as Mexican customs officials update computer systems daily, causing disruptions in export documentation. With the process now being handled manually, delays are expected to continue.

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



Berries (Strawberries)

ALERT

Strawberry supplies remain tight across all regions, with markets heavily impacted by high Valentine's Day demand. As the holiday pull subsides, demand is expected to ease heading into the weekend. However, production challenges persist, including logistical issues and adverse weather, particularly rain in California. While prices may soften slightly, the typical post-holiday market saturation seen in previous years may not materialize due to continued supply constraints.

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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Commodity Updates



Broccoli

Broccoli quality remains strong overall, with only occasional yellowing or brown bead. Sizing has improved over the past week, and the market is expected to remain 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

Domestic production has shifted to Oxnard, with initial volume slightly below expectations, but it is expected to meet target output in the coming weeks. Recent rain has had minimal impact on quality. Production in Mexico is in full swing, and additional capacity should be available for promotions.

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



Carrots

Harvest will continue in the Bakersfield area for the next couple of weeks before moving to the Imperial Valley, where the outlook is positive. However, due to a recent freeze in the Southeast, we've encountered some delays in Lake Park, GA, which may last for the next 1-2 weeks. I will keep everyone updated on when we can resume shipping volume from GA. A quick reminder to please submit snack pack orders 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

Cauliflower supplies are expected to remain strong across all regions. While there may be occasional bruising and some minor texture issues, overall quality remains good. The market is anticipated to stay steady 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



Celery

Overall demand is moderate, with large sizes, particularly 24-counts, being in lighter supply this week and commanding higher prices. All orders are expected to be filled in full. Quality remains strong, and Santa Maria/Oxnard will be the most competitive regions in terms of both availability and pricing.

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 sizes peaking at 56ct and smaller, and 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

California (Year Round)	Light	\$\$\$	Good
Texas (October - April)	Light	\$\$\$	Good



Citrus (Lemons)

Markets remain steady overall, with peak sizing on 115ct and smaller. District 3 (CA Desert/AZ) is winding down, with about a week left in the season for loading in the Yuma area. Meanwhile, District 1 (San Joaquin Valley) continues to ramp up, offering strong volumes each week.

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

Oxnard/Ventura (October - February)	Steady	\$\$\$	Good
San Joaquin Valley (October - May)	Light	\$\$\$	Good



Citrus (Limes)

Mexico's new crop is showing improved fruit color and quality, but recent rain has caused some oil spots and breakdowns, leading to a dominance of smaller sizes in the market. Larger sizes are expected to remain limited through March, which, combined with the tight supply, may lead to a stronger market throughout February.

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

Veracruz (Year Round)	Steady	\$\$\$	Good
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Citrus (Oranges)

ALERT

Peak sizes have shifted to 88ct, with markets leveling out on smaller sizes. There are still great deals available on 88ct and smaller, with Brix levels around 13. It's shaping up to be a strong year for foodservice. Valencia oranges are expected to begin arriving by late May or early June.

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

San Joaquin Valley (Year Round)	High	\$\$\$	Excellent
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Cucumber

Eastern supply from Honduras is sufficient, with Florida's spring crops expected to begin in March. Mexican volume remains strong, with crossings through Nogales and McAllen areas continuing at good levels.

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

Florida (Nov. - May)	Steady	\$\$\$	Fair
Mexico (November - May)	Steady	\$\$\$	Good

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

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Commodity Updates



Eggplant

Supplies in Florida and Mexico are currently at adequate levels. Production in Florida is expected to improve by mid-March as spring crops come into full swing.

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



Garlic

Garlic quality remains excellent, with supplies expected to stay 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)

Consumers of imported grapes saw relief last month when the anticipated port strike didn't materialize. Retail demand had been lower in anticipation of potential disruptions, and once the strike was averted, the market shifted to a supply-exceeds-demand situation. Pricing has since been adjusted to stimulate movement, but with seasonal supply increases in February, the market remains well-stocked. Stable conditions are expected to continue into March.

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 are expected to remain strong this week and next, with the market anticipated to stay steady throughout.

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



Kale

Kale supplies and quality are excellent this week, and the market is expected to remain steady going into next week.

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

Warm temperatures in the desert region have led to a surplus of product, and with the Valentine's pull now over, expect multiple suppliers to ramp up volume-based orders this week. Take advantage of the opportunity to promote as much as possible. Quality remains strong, with weights ranging from 40-44 pounds from various shippers. The only minor concern is slight misshaping of heads, but this is minimal and shouldn't impact overall quality.

Commodity/Region Supply Price Quality

Mexico (Year Round)	High	\$\$\$	Good
Santa Maria, California (March-December)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Lettuce Leaf

Romaine, along with green and red leaf, is thriving in the desert due to ideal growing temperatures, leading to increased production. Romaine heart availability has also risen, with multiple suppliers in the mix. This is a great time to promote, as demand is expected to stay in line with supply throughout the week. Overall quality remains excellent across all leaf varieties, with strong offerings from multiple growers.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Steady	\$\$\$	Good
Salinas, California (May - October)	Steady	\$\$\$	Fair



Lettuce Tender Leaf

Quality of tender leaf items like arugula, spinach, and cilantro is improving. Issues such as mildew, discoloration, and tip burn have been minimal. Expect both quality and supply to continue improving in the coming days.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Fair
Yuma, AZ (Nov. - May)	Steady	\$\$\$	Good



Melon (Cantaloupe)

ALERT

Cantaloupe prices remain high due to persistent offshore growing conditions and supply chain challenges. However, the spring crop (third rotation) from Guatemala is nearing harvest and expected to help ease supply constraints.

Commodity/Region Supply Price Quality

Central America (December - May)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Melon (Honeydew)

ALERT

Nogales honeydews from Mexico are currently available, with larger sizes dominating the market. Offshore honeydew supplies are improving and are now available at all major ports, including CA, TX, FL, and the Northeast.

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

ALERT

Due to reduced acreage in Mexico, Nogales watermelons are expected to see stable demand for the remainder of the season. Offshore watermelons are also in strong supply, helping to meet demand during gaps in Mexican watermelon availability.

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

There is promotable volume and great deals available on both white and brown mushrooms.

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

Currently, storage crops are showing good to excellent quality. There is a strong supply of red and yellow onions from Western Idaho, and suppliers are open to making deals as demand softens. Volume deals on jumbo red and yellow onions are available. However, transportation disruptions may occur due to upcoming storms across the country. Mexican onions are also available, with quality ranging from good to excellent.

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



Pears

Pears remain in limited supply and are expected to stay that way until mid-July when California's new crop of Bartletts becomes available. This year, the Washington crop is down by 25-50%, depending on location and variety. Bartletts are nearing the end of their season and will likely be finished by the end of the month. Bosc pears have seen the sharpest volume decline and will continue to be in a demand-exceeds-supply situation until the new crop arrives. Anjou pears are now the primary variety and are expected to see a steady increase in price throughout the year.

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

Pineapple supply will remain tight until the end of February, with peak volumes expected to arrive in May. Over the next 3-4 weeks, flexibility in sizes will be necessary to balance supply and demand. Costa Rican pineapples are the primary source, with contracted business taking precedence. Large crownless pineapples are in high demand, and rain until mid-April is expected to lower yields. Mexican pineapples are available and offer excellent quality.

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



Potatoes

The market remains steady this week with stable pricing. Distributors are increasingly looking for DLVD pricing rather than FOB. While freight costs have been stable, supply levels are being closely monitored due to winter storms. February is also Idaho Potato Lovers Month, a great time to promote these high-quality potatoes!

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



Squash

Zucchini supplies are plentiful, and promotable volumes are available. However, yellow squash is slightly behind in growing areas in FL and MX, with supplies expected to remain tight until next week.

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



Stone Fruit

This month marks the transition from domestic to imported kiwi. While California fruit is still shipping, imports have now entered the market. Imported peaches, plums, and nectarines are arriving on both coasts. With moderate supplies and light demand, this market is expected to remain stable through the end of the month and into March.

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



Tomatoes

Supplies remain strong on both coasts, although cooler weather in Florida may slightly slow production. Prices are at the minimums, and overall quality is excellent. Products are available for loading in 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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Weather Updates



CALIFORNIA

Light to moderate showers continue today, with totals up to ½". After a dry afternoon, moderate to heavy showers and storms will develop after sunset and last through Friday night, with totals ranging from 1½" to 4", and some isolated storms exceeding 5". Morning lows will range from the low 30s to low 40s, warming to the upper 30s to low 50s by Friday. Daytime highs will be in the low 50s to low 60s. Clear skies on Saturday will bring cooler lows in the mid 30s to mid 40s and slightly warmer highs.



MEXICO

Warm temperatures will persist across Central Mexico through February 16th, with highs in the mid 70s to mid 80s most days. Morning lows will range from the mid 40s to mid 50s through the weekend. Dry conditions will continue, with only the possibility of a light shower or sprinkle.



FLORIDA

Warm temperatures will continue through Thursday, with showers increasing over northern Florida, extending into Friday. Rainfall totals will range from 0.02" to 1.00" depending on location, with higher amounts possible in thunderstorms. Expect cooler weather on Friday, then warmer and dry on Saturday. Another round of showers is likely on Sunday, with near-normal temperatures. Winds will gust 20-30 mph through February 14th.



ARIZONA

Latest models show much drier conditions as low-pressure systems approach. Today, central Arizona is only expected to see trace amounts of rain, with no measurable rain elsewhere. Thursday will be cloudy, with isolated light showers in the higher elevations, but little to no rain in the low valleys. By Friday, most of the moisture will shift north of I-10 in Arizona, with light showers throughout Maricopa County and isolated rain lingering in the Coachella Valley and Borrego Springs. Morning lows will be in the upper 30s to 40s, warming to the mid 40s to 50s by Friday, and cooling again over the weekend.

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

Freight Updates



Weather out west continues to look like significant rain and possible snow over the low lying California passes creating adverse driving conditions for trucks connecting between California Central Valley and the Desert Regions. Outbound Florida truck market is active with Fresh Flower loads and capacity is fairly tight. Expect delays at the US/Mexico borders as political issues continue to unfold.



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

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

	01/27/25	02/03/25	02/10/25	Change from	
				week ago	year ago
U.S.	3.659	3.660	3.665	↑ 0.005	↓ -0.444
East Coast (PADD1)	3.805	3.778	3.761	↓ -0.017	↓ -0.440
New England (PADD1A)	3.961	3.968	3.970	↑ 0.002	↓ -0.380
Central Atlantic (PADD1B)	3.995	3.986	3.974	↓ -0.012	↓ -0.343
Lower Atlantic (PADD1C)	3.718	3.682	3.661	↓ -0.021	↓ -0.482
Midwest (PADD2)	3.568	3.568	3.582	↑ 0.014	↓ -0.460
Gulf Coast (PADD3)	3.378	3.395	3.393	↓ -0.002	↓ -0.472
Rocky Mountain (PADD4)	3.431	3.471	3.528	↑ 0.057	↓ -0.277
West Coast (PADD5)	4.274	4.289	4.307	↑ 0.018	↓ -0.416
West Coast less California	3.823	3.857	3.883	↑ 0.026	↓ -0.381
California	4.793	4.787	4.796	↑ 0.009	↓ -0.454

*prices include all taxes

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

Crop Updates



A couple of strong Pacific storm systems are set to bring strong winds and heavy precipitation throughout California into the weekend. The brunt of these systems will impact California however strong winds 20-35mph and a slight chance of light rain are expected across the Desert growing regions as these systems roll through.

Iceberg pack-outs currently are showing heavy density heads with growth crack and burst evident in some of the solid heads. Iceberg, romaine, and leafy green fields continue to exhibit blister, epidermal peeling, rib discoloration and fringe burn along with increasing reports of weak tip, in current stands. Harvesting crews will be trimming out the outer leaves in an effort to reduce these defects in the box resulting in smaller head size along with lighter color and carton weights. These supplies will likely continue to show some premature pinking along the rib that tend to show up during transit and storage. Processed leafy green items will also likely see an increase in this oxidation/pinking showing up in the bag. Insect pressure is on the rise in the region with the recent warmer temperatures. The numerous small insects (flies, gnats, aphids, thrips) will tend to hide in the leaf lettuces, especially during stormy weather.

The spring mix and tender leaf items will continue to show some yellowing and discoloration along with weaker texture and lesser shelf life due to the previous cold temps and strong winds.

It remains important to keep your rotations in check as the overall quality and shelf life of most crops will be challenged. We will keep an eye on the upcoming and the impact on the various crops in the line of fire.



TIM LYNCH

QUALITY ASSURANCE MANAGER