

The Source

Commodity of the Month - Potatoes

MARKET ALERTS

Asparagus: Asparagus supplies from Mexico and Peru remain limited on larger sizes. Small and Standard sizes will dominate, with larger sizes seeing stronger markets and smaller sizes rising slightly on demand.

Bell Peppers: Markets stay steady at high levels. Limited East Coast supply shifts demand to California, where prices rise as new fields come in. Quality is strong. Red bells remain tight, with limited supply expected for two weeks.

Blackberries: Product remains very tight due to cooler temperatures and reduced Mexican crossings, resulting in a market where demand continues to exceed supply.

Brussel Sprouts: Sprout supplies remain very tight with high prices as demand exceeds supply. Oxnard production is nearly done. Quality issues include elongated cores, insect damage, and some discoloration.

Lemons: Markets remain strong. District 1 is finished; District 2 is now the main region. Sizes 165ct and smaller are very limited. Choice grade dominates, with less Fancy available. Offshore fruit delayed until late July/early August; Mexico ramps up next week.

Pineapple: Costa Rican pineapples face high demand and limited crownless supply. Longer flowering and heavy storms are delaying harvests.

JULY 23, 2025

CROP UPDATES

Tropical activity is calm, with a low-pressure system near Florida next week. A heat dome brings warm temps to the Mississippi Valley and Northeast. Central Mexico gets less rain, NW Mexico stays in drought. Cool, cloudy weather slows growth in Coastal California, with pest issues hitting broccoli and brussels sprouts. Supplies remain tight, especially for brussels sprouts. Weather will impact future supply. [Read more](#)

WEATHER

California: Cooler temps and spotty drizzle persist through the week due to weak high pressure and a marine layer. Morning lows in the mid-40s to mid-50s; highs range from low 60s on the coast to upper 80s south of Soledad. Warming returns Sunday with highs reaching mid-80s to mid-90s inland.

Mexico: Isolated showers will increase across the region by the weekend, with 0.05" to 0.20" of rain and higher amounts in storms. Temps will be in the low 70s to low 80s, with lows in the mid-50s to mid-60s.

Florida: Scattered showers and storms are expected Wednesday-Thursday, with 0.15"-0.35" of rain and higher amounts near Big Bend. Temps stay warm—highs in the upper 80s to mid-90s, lows in the 70s. Winds gust near 20 mph through Friday.

Arizona: A stalled low off the West Coast is keeping low desert temps below normal through Friday. Warming returns this weekend, with highs rising from upper 90s-105°F to 105-110°F by Sunday. Lows remain in the low to mid-70s.

IN PEAK SEASON



FREIGHT

Freight this week continues to be steady, but slower with the post holiday markets. Now is a great time to visit with your Pro*Fresh logistics representative and discuss a fall freight plan that is suited for you!

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Commodity Updates



Apples

The apple market remains steady overall. While no varieties are fully finished, availability is lighter on Golds, Pinks, Honeys, and Cosmics as some shippers wind down. Pricing has stayed mostly firm. New crop arrivals begin in August, with Ginger Golds and Galas mid-month, followed by Honeycrisp at month's end.

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



Asparagus

ALERT

Asparagus supplies from both Mexico and Peru remain limited on larger sizes. Over the next few weeks, expect mostly Small and Standard sizes. Markets for larger sizes are strengthening, with slight upward pressure on smaller sizes due to increased demand.

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



Avocados

Markets on 48ct fruit remain slightly stronger, while 60ct and 70ct sizes continue to perform well as we transition from the Normal crop to the Flora Loca crop. Shippers are managing a mix of both crops and working carefully to keep them separate in cartons to avoid checkerboarding. The new crop is expected to peak on 48/60ct sizes, with very clean fruit and minimal #2 grade—typical for this time of year. The California season is gradually winding down and is expected to finish in about a month. Offshore arrivals continue on both coasts.

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



Bell Peppers

ALERT

Markets remain steady at elevated levels. Limited East Coast supply—due to weather and delayed local programs—has shifted demand to California, where prices are rising as new fields come into production. Quality out of California remains strong. Red bells are especially tight, with overall supply expected to remain limited for the next two weeks.

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

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

Supply Partners



Commodity Updates



Berries (Blackberries)

ALERT

Product remains very tight due to cooler temperatures and reduced Mexican crossings, resulting in a market where demand continues to exceed supply.

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

Good availability persists from the PNW, New Jersey, and Michigan. Markets remain steady with slight downward pressure.

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

Steady supplies continue from Mexico, while harvests remain light on the Central California Coast.

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

Unexpected harvest increases in Salinas and Watsonville have saturated the market. New crop fruit from Santa Maria has just begun, with southern volumes set to rise in the coming weeks.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	High	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Broccoli

Broccoli supplies have improved across all regions, with good availability and quality expected to continue into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	Steady	\$\$\$	Good



Brussel Sprouts

ALERT

Sprout supplies remain extremely tight, with elevated pricing as demand continues to outpace supply. Production out of Oxnard is nearly complete. Quality issues persist, including elongated cores and stems, light insect damage, and occasional internal discoloration.

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



Carrots

Harvest in the Bakersfield region is going strong and will continue through the end of July before transitioning to the summer season in Cuyama/Lancaster, which runs through November. Quality and sizing remain strong, though the jumbo market has tightened slightly as other regions finish. Reminder: please submit snack pack orders at least 48 hours in advance.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	High	\$\$\$	Excellent
Kern County (October - Feb)	Steady	\$\$\$	Good
Various Northwest Regions (July - October)	Steady	\$\$\$	Good



Cauliflower

Cauliflower supplies and quality are strong, with the market expected to remain steady on the lower end heading into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	Steady	\$\$\$	Good
Salinas, CA (May - Oct)	Steady	\$\$\$	Good



Celery

Supplies remain steady this week in both the north and south. The market is flat, with all sizes readily available. Shippers are flexible on large-quantity orders, so promotion is encouraged. Overall quality remains above average across the industry.

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

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

Supply Partners



Commodity Updates



Citrus (Grapefruit)

Star Rubies are available and peaking on 40ct and larger sizes, shipping out of both Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

ALERT

Markets remain strong across the board. District 1 (San Joaquin Valley) has finished, with District 2 (Ventura County/Oxnard) now the primary growing region. Sizes 165ct and smaller are extremely limited. Choice grade will dominate this crop, with less Fancy grade available due to growing conditions. Offshore fruit arrivals have been delayed until late July or early August, while Mexico is expected to ramp up production next week.

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



Citrus (Limes)

Size distribution is evening out, with peak volume centered around 175/200 and less availability at the smaller and larger ends (110/250). Fruit availability remains good, but increased grading is needed due to recent weather challenges like heat and rain. Total volume is expected to decline by mid-August, which may lead to rising prices around that time.

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

Valencias are the main variety, currently peaking on 113ct and 138ct as the season begins, with sizes expected to increase as it progresses. Gas times of around 48 hours are being used to enhance color. Brix levels are in the 12-13 range, and the fruit is eating very well.

Commodity/Region	Supply	Price	Quality
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San Joaquin Valley (Year Round)	Steady	\$\$\$	Good
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Cucumber

Baja is experiencing good production and quality. Eastern supply remains limited due to weather, while cucumbers are also crossing through South Texas with adequate availability.

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

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

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Commodity Updates



Eggplant

Eggplant markets are slightly higher, driven by the Eastern transition and weather-related challenges in California, which are keeping demand strong.

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



Garlic

The new California garlic crop begins this week, showing good quality. Supplies from Mexico continue alongside the California harvest.

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 grapes are in full swing from Bakersfield to Fresno, with good quality overall. Early varieties are running small in size, but expect a split market as larger varieties come online next week.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies and quality remain strong this week. The market is expected to stay steady and on the lower side heading into next week.

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



Kale

Strong supplies are keeping the kale market steady, with quality remaining excellent. The market is expected to remain stable into next week.

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

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

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Commodity Updates



Lettuce Iceberg

All escalations on value-added lettuce items have ended as the market shifts. While pricing gaps exist, they are expected to close later this week. Production remains strong throughout both Northern and Southern California, with Mexico also increasing output. Overall quality is good, with weights ranging from 39 to 43 pounds across regions. Minor reports of misshapen heads have been noted but remain minimal.

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



Lettuce Leaf

The market remains steady for romaine, green leaf, and red leaf. Aside from minor tip and fringe burn, overall quality is above average. Romaine heart production is expected to increase throughout the week, while demand remains soft. Weights and sizing on leaf items continue to be above average industry-wide, with pricing expected to stay competitive.

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

Tender leaf items continue to show good overall quality across all fields, with only minimal discoloration and tip burn. The market and supplies are expected to remain steady.

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



Melon (Cantaloupe)

The domestic cantaloupe market is strong on the West Coast, as heavy rains in regional growing areas have shifted demand westward. Warm weather is driving excellent quality, with fruit peaking on 9s and 12s and Brix levels ranging from 13-16. Jumbos and smaller sizes are becoming limited. Retail demand is high, and suppliers are gearing up for back-to-school volume.

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

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Commodity Updates



Melon (Honeydew)

The domestic honeydew market is strong on the West Coast, with heavy rains in regional growing areas shifting demand west. Warm weather is producing high-quality fruit, peaking on 5s. Retail demand remains strong as suppliers prepare for back-to-school volume. Nogales melons are now finished for the season.

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

Domestic watermelons are currently available in North Carolina, Indiana, and Central California. Recent rain on the East Coast has impacted supply, shifting demand westward for the week. Prices are expected to remain stable, though supplies are tightening due to strong retail pull.

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

Excellent supplies persist, helping to keep the market stable and well-positioned to meet current demand.

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

Onions are currently available from California and New Mexico, with a mix of U.S. and Mexican crops in New Mexico. Demand remains strong as yields from Mexican onions begin to decline. Red and white onion markets have stabilized over the past week. Idaho's season is expected to start slowly next month. Contracts are available for the upcoming storage season.

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

The Washington pear season is essentially finished. California Bartletts are now in full production, with a strong crop and expected good quality. California Bosc and Red Pears are scheduled to begin during the last week of the month.

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

ALERT

Costa Rican pineapples are facing increased demand and limited inventory of crownless fruit. Longer flowering times are delaying harvests, while heavy thunderstorms are currently affecting growing regions in Costa Rica.

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



Potatoes

Idaho 40-70 count potatoes are tight through August; Burbank available all summer. Prices in ID and CO expected to rise. New Eastern ID harvest begins mid-August. CO potatoes very limited. Color potatoes from CA, ID, TX; MN starts 7/21. Red demand strong; yellows steady. East Coast sweet potatoes tight until September new crop.

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



Squash

Squash supplies have improved as more local deals come online. Quality is strong, with promotable volumes readily available.

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



Stone Fruit

Peaches, plums, and nectarines are in good supply with a steady market. Specialty items like donut peaches and pluots are also available. The imported kiwi market remains steady at elevated prices and is expected to continue until California's season starts in October. Washington cherries have passed their peak, and the market is firming.

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



Tomatoes

Eastern production is ramping up, with active harvests in Tennessee and Virginia and additional supply expected next week. California supply is good, though some heat-related quality issues are being reported. Mexico remains steady. The Tomato Suspension Agreement ended on July 14, removing the established floor price.

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

Weak high pressure and a deep marine layer will keep temperatures below average with spotty drizzle through the end of the week. Morning lows will range from the mid-40s to mid-50s, with daytime highs in the low to mid-60s along the coast, low to upper 70s in the coastal valleys, and upper 70s to upper 80s south of Soledad. By Sunday, a strengthening high will weaken the marine layer, warming inland temperatures to the mid-80s to mid-90s.



MEXICO

Isolated showers will occur, with chances spreading across most of the region by the weekend. Rainfall totals will generally range from 0.05" to 0.20", with higher amounts possible in thunderstorms. Maximum temperatures will mostly be in the low 70s to low 80s through the weekend, with lows in the mid-50s to mid-60s through Sunday morning.



FLORIDA

Scattered showers and thunderstorms are expected Wednesday into Thursday as a low-pressure system brings moisture to the area. Rainfall totals will generally range from 0.15" to 0.35" statewide, with higher amounts possible around the Big Bend and within some storms. Temperatures will stay warm over the next five days, with highs in the upper 80s to mid-90s through the weekend and lows in the low to upper 70s through Sunday morning. Winds will gust near 20 mph through Friday.



ARIZONA

A stalled low-pressure trough off the West Coast is bringing cooler, drier air into the low deserts, keeping temperatures a few degrees below normal through Friday. Warming is expected over the weekend, with temperatures returning to near seasonal normals by Sunday. Highs will range from the upper 90s to 105°F through Friday, increasing to 105–110°F by Sunday afternoon. Morning lows will stay in the low to mid-70s throughout the period.

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

Freight Updates



Freight this week continues to be steady, but slower with the post holiday markets. Now is a great time to visit with your Pro*Fresh logistics representative and discuss a fall freight plan that is suited for you!



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

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

	07/07/25	07/14/25	07/21/25	Change from	
				week ago	year ago
U.S.	3.739	3.758	3.812	↑ 0.054	↑ 0.033
East Coast (PADD1)	3.765	3.793	3.821	↑ 0.028	↓ -0.051
New England (PADD1A)	3.967	3.969	3.984	↑ 0.015	↓ -0.117
Central Atlantic (PADD1B)	3.936	3.953	3.975	↑ 0.022	↓ -0.086
Lower Atlantic (PADD1C)	3.680	3.716	3.747	↑ 0.031	↓ -0.031
Midwest (PADD2)	3.733	3.733	3.795	↑ 0.062	↑ 0.063
Gulf Coast (PADD3)	3.383	3.403	3.476	↑ 0.073	↑ 0.015
Rocky Mountain (PADD4)	3.666	3.713	3.770	↑ 0.057	↑ 0.039
West Coast (PADD5)	4.462	4.498	4.542	↑ 0.044	↑ 0.148
West Coast less California	4.088	4.122	4.176	↑ 0.054	↑ 0.199
California	4.892	4.932	4.963	↑ 0.031	↑ 0.089

*prices include all taxes

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

Crop Updates



Tropical activity remains relatively calm in the Pacific basin however, similar to last week, we are watching a low-pressure system that will move across northern Florida into the Gulf early next week. Very warm temperatures are expected across the Mississippi Valley into the Northeast as a heat dome builds across the region.

Central and West-Central Mexico is forecast to receive less rain helping promote growth in the region. The heavy rain this season has helped with the drought in the area over the past few years.

Northwestern Mexico (Sinaloa, Sonora, Chihuahua) remain in severe drought conditions currently. Overall lettuce and leaf supplies are expected to continue to improve in the better weather.

In the Coastal California growing regions, unseasonably cool temperatures will continue to lessen growth rates across the region as the heavy marine layer continues especially for fields closest to the coast. Temperatures the past few weeks have averaged 7-10 degrees below seasonal norms. Mold, mildew and soil disease are on the rise in the fields, however not a major concern currently. Of most concern for growers remains Diamondback moth infestation in the Cole crops across the valley. The larvae are very active and well camouflaged on the plants making it very difficult for growers and harvest personnel to find the embedded pests. Broccoli and especially brussels sprouts have been impacted by infestations in some fields. Brussels sprouts were already very limited due to seasonal transition (Mexico finishing early due to quality issues) and cooler temperatures limiting growth in the upcoming Salinas Valley region. Supplies are expected to remain tight for the next couple weeks at a minimum.

As always, weather patterns will be crucial to future supplies from the numerous growing regions.



TIM LYNCH

QUALITY ASSURANCE MANAGER