

The Source

Commodity of the Month - Potatoes

MARKET ALERTS

Asparagus: Large to Jumbo sizes are very limited on both coasts; Smalls and Standards are more available. Cooler weather in Peru and Mexico's production shift are tightening supply. Expect higher markets and limited availability in the coming weeks.

Blackberries: Demand exceeds supply. California production may rise next week with warmer weather. Open market product is scarce as shippers focus on contracts.

Brussel Sprouts: Production is ongoing in the Pacific Northwest, Mexico, California, North Carolina, New Jersey, and transferred fruit is available in Florida..

Lemons: Markets remain strong with District 2 (Ventura/Oxnard) as the only active region. Sizes 165ct and smaller are very limited. Choice grade dominates, while Fancy grade is reduced. Common quality issues include softness, decay, and scarring. Shippers are culling compromised fruit. Markets are higher than last summer due to strong demand and lower imports.

JULY 30, 2025

CROP UPDATES

Washington apple and pear harvests begin in August, with strong crops expected due to ideal weather. Apple volumes, especially Honeycrisp and Cosmic Crisp, could rise 20%+. Pears may see a 25% volume increase. Sizes are trending smaller, benefiting foodservice. [Read more](#)

WEATHER

California: High pressure and a moderate marine layer will keep temperatures near or slightly above average this week. Morning lows range from mid-40s to upper 50s; highs from mid-60s on the coast to up to 100°F south of Soledad.

Mexico: Isolated showers expected through Thursday, increasing Friday, then isolated again Saturday. Temperatures remain seasonal with highs in the low 70s to low 80s and lows mid-50s to low 60s.

Florida: Warm temps with isolated to scattered storms through August 2nd. Rain totals 0.02–0.20" with some heavier storms. Highs in the 90s, lows mid-70s to low 80s. Tampa Bay winds gust 20–25 mph; lighter winds elsewhere.

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 sees slower demand for trucks down along the Mexican border and Florida. West coast is steady with volume meeting demand for open capacity. Expect markets to remain steady for this first week of August

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Commodity Updates



Apples

The apple market remains steady for now. While no varieties are completely out, supplies of Golds, Pinks, Honeys, and Cosmics are beginning to taper off with some shippers. Despite this, pricing has stayed fairly consistent. Looking ahead, new crop apples are expected to start arriving in August, with Ginger Golds and Galas by mid-month and Honeycrisp toward the end of the month.

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



Asparagus

ALERT

Large, Extra Large, and Jumbo sizes will be very limited on both coasts, while Smalls and Standards remain more available. Cooler weather in Peru and a production transition in Mexico are tightening supply. Expect elevated markets and limited availability over the next couple of weeks.

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



Avocados

Markets on 48ct, 60ct, and 70ct are improving as the Flora Loca crop ramps up. We're seeing a mix of Normal and Flora Loca fruit, with shippers working to keep them separate. The Normal crop is nearly finished, and Flora Loca is becoming the primary harvest. Dry matter is in the low to mid 20s, compared to low 30s on the older crop, so expect longer ripening times. Fruit quality is strong, with very little #2 grade, which is typical for this season. California production is slowing and expected to wrap up in a few weeks. Offshore fruit continues to arrive on both coasts.

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



Bell Peppers

Supply remains tight in the East, though Michigan's harvest has just started, helping boost availability. Eastern regions are slightly behind schedule but showing improvement. Out West, volume is picking up from California and Washington, with a broader recovery expected soon.

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

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

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Commodity Updates



Berries (Blackberries)

ALERT

Demand continues to exceed supply on this item. California production is expected to increase slightly next week as warmer weather sets in. For now, open market product remains scarce, with shippers prioritizing contract commitments.

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



Berries (Blueberries)

Current production areas include the Pacific Northwest (British Columbia, Oregon, and Washington), as well as Mexico, California, North Carolina, and New Jersey. Transferred fruit is also available in Florida.

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



Berries (Raspberries)

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

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



Berries (Strawberries)

Some shippers are carrying heavy volumes of fruit amid light demand, keeping the market temporarily soft. Volume deals are being offered, preventing pricing from firming up for those with moderate inventories. New crop fruit from Santa Maria is just starting to enter the market, with increased production expected by mid-August. Oxnard production is set to begin shortly after.

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

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

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Commodity Updates



Broccoli

Broccoli supplies remain strong this week for both bunch and crowns. The market is expected to stay steady heading 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 exceed supply. Production in Salinas is gradually increasing but remains behind schedule. 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	\$\$\$	Fair



Carrots

Harvest in the Bakersfield region continues strong with about one week remaining. The season will then transition to Cuyama/Lancaster for the summer harvest, which will run through November. Quality and sizing remain solid. Reminder: please submit snack pack orders 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 remain strong across all sizes and regions. The market is expected to stay steady 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

Demand is low, and there is ample celery available in all sizes. This trend is expected to continue at least through this week. Pricing is very competitive, with multiple shippers offering flexible rates. Quality remains good with most suppliers.

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

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

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Commodity Updates



Citrus (Grapefruit)

Star Rubies are available, peaking at 40ct and larger sizes, shipped from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

ALERT

Markets remain strong, with District 2 (Ventura/Oxnard) as the only active growing region. Sizes 165ct and smaller are very limited. Choice grade dominates, while Fancy grade is reduced due to growing conditions. Quality issues like softness, early decay, and scarring are common. Shippers are working to cull compromised fruit. Expect higher markets than last summer, driven by strong demand and lower import supplies.

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



Citrus (Limes)

The market is steady to slightly higher, with prices expected to rise next week as yields of premium-grade fruit decline due to extreme heat and humidity. Issues with oil spotting and styler are being reported. Price and availability fluctuations are anticipated through August and September.

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



Citrus (Oranges)

Vals are currently peaking on 113ct and 88ct, with sizes expected to increase as the season progresses. Gas times of about 24 hours are being used to enhance color. Brix levels are around 13, and the fruit is eating very well.

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



Cucumber

Cucumber prices are down this week as supply increases from key local and regional areas including MI, OH, NY, NJ, and PA. Baja also continues to provide good supply and quality. Strong volume is expected through August, making it an ideal time to promote.

Commodity/Region	Supply	Price	Quality
Ohio/NC/MI/NJ (June - September)	Steady	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good

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

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Commodity Updates



Eggplant

The market is down, but promotable eggplant volume is expected soon from OH, MI, CAN, and NY. Out West, Mexican supply is limited and CA prices have firmed up.

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



Garlic

The new California garlic crop has started with good quality. Mexican supplies 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. The market is steady and expected to stay on the lower side heading into next week.

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



Kale

Strong supplies and excellent quality are keeping the kale market steady, with stability expected to continue 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

Demand continues to exceed supply across Salinas, Santa Maria, and Oxnard. Value-added lettuce items will begin escalating this week, with increases likely continuing into next week. Lighter weights and misshapen heads are ongoing quality concerns.

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



Lettuce Leaf

Unlike lettuce, romaine and green leaf remain steady in the market. Minor tip and fringe burn have been reported, but overall supply is stable, including romaine hearts. Pricing is competitive, with favorable weights and sizing across all leaf items.

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



Lettuce Tender Leaf

Supplies and quality are improving this week. Spring mix is showing fewer varieties in the blends, with some leaves having quality issues. However, the varieties included are looking good.

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



Melon (Cantaloupe)

The domestic Cantaloupe/Honeydew market is strong on the West Coast as heavy rains in regional areas have shifted demand west. Warm weather is driving high quality, with Cantaloupes peaking on 9s and 12s and Brix levels between 13-16. Jumbos and smaller sizes are becoming limited. A strong push is expected in August.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	Steady	\$\$\$	Good

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

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Commodity Updates



Melon (Honeydew)

The Honeydew market remains strong post-holiday. Warm weather is producing high-quality melons, peaking on size 5 with Brix levels between 13–16. Supply is primarily coming from Central California, while Nogales availability remains very limited.

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 available from NC, Indiana, Texas, and Central California. Rain on the East Coast has shifted demand westward. Prices are expected to stay low, especially on larger fruit, until demand picks up and supplies move.

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

Now is a great time to promote mushrooms in the kitchen.

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, while Mexican yields are beginning to decline. Red and white onion markets have stabilized since last week. Idaho's season is expected to start slowly next week.

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

California Bartletts are in full production with a strong crop and good quality expected. Harvest has begun for California Bosc and Red Pears. Washington's new crop Bartletts are anticipated to start around the third week of August.

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

Crownless pineapples remain in high demand with limited inventory. Longer flowering times are delaying harvests, and heavy thunderstorms in Costa Rica are impacting growing regions. Some substitutions and order changes are expected.

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



Potatoes

Idaho 40-70 count potatoes are tight through August, with Burbank available all summer. Prices in ID and CO are expected to rise soon. New Eastern Idaho harvest starts mid-August. Colorado potatoes are very limited. Color potatoes come from CA, ID, MN, and TX; red demand is strong, yellows stable. East Coast sweet potatoes are tight until new crop in September.

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



Squash

Squash supply is strong from local regions like NJ, NY, OH, MI, AR, and PA, resulting in softer market prices due to ideal Midwest weather. Mainland Mexico is winding down, while Baja continues limited production. Retail-grade squash remains tight and priced at a premium, with California maintaining solid volume.

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. Imported kiwi remains steady at elevated prices until California's season starts in October. Washington cherries are nearly finished for the season.

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



Tomatoes

Roma supply is stable across regions, with quality production from Mexico and California. Eastern areas are ramping up but remain below peak due to weather. Western supply is consistent with improving sizing and solid quality. Grape tomato supply is increasing on both coasts, with Eastern production improving and strong quality. Steady supply continues from Baja and Central Mexico.

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

High pressure and a moderate marine layer will keep temperatures near or slightly above average through the week. Morning lows will range from the mid-40s to upper 50s. Daytime highs will be mid to upper 60s along the coast, mid-70s to mid-80s in coastal valleys, and upper 80s to 100 degrees south of Soledad.



MEXICO

Isolated showers are expected through Thursday, with a slight increase in chances on Friday, then returning to isolated showers on Saturday. Temperatures will stay seasonal through August 2nd, with highs mostly in the low 70s to low 80s and lows in the mid-50s to low 60s from Tuesday morning through Saturday morning.



FLORIDA

Warm temperatures with isolated to scattered showers and thunderstorms are expected through August 2nd. Rainfall totals will generally range from 0.02" to 0.20", with higher amounts possible in some storms. Highs will be in the low to upper 90s from Tuesday through Saturday, with lows in the mid-70s to low 80s. Winds near Tampa Bay will gust between 20 to 25 mph, while most of southeast Florida will experience lighter, more variable winds through July 31st.



ARIZONA

Temperatures will stay near to above normal into the weekend. Southwest Arizona valleys will see highs between 108-111°F with lows in the mid 70s to low 80s. Southeast California can expect highs of 110-114°F and morning lows in the mid 70s. Monsoonal moisture returns to central and eastern Arizona on Thursday, bringing isolated showers to higher elevations near Phoenix. Light southwesterly winds will persist through Wednesday, strengthening to southerly gusts of 20-25 mph on Thursday.

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

Freight Updates



Freight this week sees slower demand for trucks down along the Mexican border and Florida. West coast is steady with volume meeting demand for open capacity. Expect markets to remain steady for this first week of August



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

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

	07/14/25	07/21/25	07/28/25	Change from	
				week ago	year ago
U.S.	3.758	3.812	3.805	↓ -0.007	↑ 0.037
East Coast (PADD1)	3.793	3.821	3.812	↓ -0.009	↓ -0.032
New England (PADD1A)	3.969	3.984	3.974	↓ -0.010	↓ -0.115
Central Atlantic (PADD1B)	3.953	3.975	3.945	↓ -0.030	↓ -0.083
Lower Atlantic (PADD1C)	3.716	3.747	3.746	↓ -0.001	↓ -0.005
Midwest (PADD2)	3.733	3.795	3.794	↓ -0.001	↑ 0.067
Gulf Coast (PADD3)	3.403	3.476	3.454	↓ -0.022	↓ -0.014
Rocky Mountain (PADD4)	3.713	3.770	3.781	↑ 0.011	↑ 0.063
West Coast (PADD5)	4.498	4.542	4.546	↑ 0.004	↑ 0.176
West Coast less California	4.122	4.176	4.189	↑ 0.013	↑ 0.221
California	4.932	4.963	4.957	↓ -0.006	↑ 0.126

*prices include all taxes

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

Crop Updates



Apples and Pears

The Washington apple harvest is fast approaching, with early varieties like Gala expected to begin in early August. Pear harvests will follow later in the month. Last year's extreme heat significantly reduced crop yields, but growers are reporting ideal conditions so far this season. As a result, expectations are high for a well-sized crop with excellent quality.

The combination of favorable weather and the natural alternate-bearing cycle is projected to bring substantial volume increases across most apple varieties. Acreage adjustments are also contributing to growth, with Honeycrisp and Cosmic Crisp expected to rise by 20% or more. Other varieties are also projected to see meaningful gains. This year's size profile is currently skewing smaller than last season, which may prove advantageous for foodservice markets.

Pear growers are also optimistic, anticipating a strong rebound after historically low yields in 2024. Early projections suggest a 25% increase in overall volume, with Bartlett, Anjou, and Bosc varieties showing particular promise. The earliest pears are expected to be harvest-ready by mid-August.

While future weather conditions could still impact the final outcome, the industry is entering the season with confidence and momentum.



TIM LYNCH

QUALITY ASSURANCE MANAGER