

The Source

Commodity of the Month - Potatoes

MARKET ALERTS

Asparagus: Mexican asparagus supplies remain tight due to weather impacts, keeping prices elevated. Limited relief is expected, with supply and quality concerns continuing into fall.

Blackberries: Blackberry supplies remain extremely tight, with limited California volume and no Oregon/Washington relief until late July.

Citrus (Lemons): Lemon supplies remain tight, keeping markets elevated. District Two is supplying the majority of fruit, with limited import support.

Onions: Onion supplies remain tight due to lower yields, keeping pricing elevated through the summer season. Central California and New Mexico are shipping, with relief expected as Pacific Northwest production begins.

Pineapple: Pineapple supplies remain steady from Costa Rica, while Mexico volumes decline after peak production. Larger sizes are improving, but crownless and organic supplies remain limited.

Potatoes: Large potato supplies are tightening due to lower pack-outs and storage issues. Washington quality remains strong, but large sizes and sweet potatoes are limited.

JULY 15, 2026

CROP UPDATES

Warm, humid conditions in the Salinas Valley are impacting quality, especially in lettuce, leaf, and strawberries, with shelf life needing close attention. Supplies remain strong on lettuce, leaf, and baby greens, while berry markets are mixed — blueberries are improving, blackberries remain tight, and raspberries are easing. Melon supplies are improving, with cantaloupes gaining volume and quality, while honeydews remain firmer due to limited smaller sizes. Overall, markets are transitioning as summer conditions continue.

[Read more](#)

WEATHER

California: Above-average temperatures will continue through the week, with inland highs reaching the 90s to 105. Increased humidity and warmer overnight temperatures are expected later in the week.

Florida: Scattered showers and thunderstorms are expected through midweek, with warm temperatures and above-normal conditions continuing.

Mexico: Scattered showers and thunderstorms are expected through midweek, with mild temperatures and limited rainfall.

Arizona: Scattered monsoon showers and thunderstorms are expected through Friday, with warmer-than-normal temperatures continuing.

FREIGHT

This week freight sees DOT back hosting yet another enforcement sweep for 2026, “Operation Safe Driver Week”. This most recent event is having similar effects as May, causing increase in rates, and driving truck availability down, especially in California. Up next is ‘Brake Safety Week” slated to take place August 23-29.

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LOGISTICS

IN PEAK SEASON

- Blueberries
- Carrots
- Citrus (Oranges)
- Grapes
- Lettuce (iceberg)
- Lettuce Tender Leaf
- Stone Fruit
- Strawberries

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Commodity Updates



Apples

The apple market is expected to remain mostly steady through July. Gold Delicious and Red Delicious supplies continue to tighten, with modest price increases expected as availability declines. Gala and Granny Smith remain well supplied, keeping those markets stable, while Fuji and Pink Lady volumes are lighter than normal but pricing has held steady.

Commodity/Region	Supply	Price	Quality
Yakima, Washington (August - July)	Light	\$\$\$	Good



Asparagus

ALERT

Mexican asparagus supplies remain limited, keeping FOB pricing elevated. Extreme heat in Baja and frequent rain in Central Mexico continue to impact yields and quality. Supplies are expected to stay tight through September, with Northern Baja providing only limited relief. Peruvian production also remains challenged by warmer winter weather, while growers continue prioritizing higher-priced export markets. Although boat arrivals have increased, overall supply and quality concerns are expected to persist into the fall.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Light	\$\$\$	Fair
Peru (Year Round)	Light	\$\$\$	Good
Ohio/NC/MI/NJ (June - September)	Light	\$\$\$	Good
Mexico (Ciudad Obregon) (Year Round)	Light	\$\$\$	Good



Avocados

Markets remain steady as the Negra crop winds down and Flora Loca becomes the primary variety. Dry matter levels remain in the mid-to-high 30% range for Negra and the mid-20% range for Flora Loca, with shippers working to minimize checkerboarding by keeping the crops separate. California production is winding down, while Peruvian fruit continues arriving on both coasts. We will provide updates as market conditions change.

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



Bell Peppers

California and East Coast supplies are improving, with markets easing as demand softens and production increases. Heat and heavy rains could impact quality and yields later this month, while Midwest and Northeast production is expected to ramp up in August.

Commodity/Region	Supply	Price	Quality
California (May - October)	Steady	\$\$\$	Good
Georgia (May - June)	Light	\$\$\$	Good
Ohio/NC/MI/NJ (June - September)	Light	\$\$\$	Good

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

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Commodity Updates



Berries (Blackberries)

ALERT

Blackberry supplies will remain extremely limited, with California production progressing slowly. Oregon and Washington crops are not expected until late July, keeping demand above available supply.

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

Oregon and Washington production has increased, improving market availability. Michigan volume is also picking up, driving markets lower.

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

Baja supplies are improving, with California production slowly increasing. Markets are trending lower as availability continues to improve.

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

Warmer temperatures and high humidity have impacted quality, causing shorter shelf life, softer fruit, and increased bruising. Quality and texture should improve as humidity decreases, though smaller sizing is reducing overall yields.

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

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Commodity Updates



Broccoli

Broccoli supplies are slightly tighter this week heading into the weekend. The market is expected to strengthen modestly going into next week.

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



Brussel Sprouts

Brussels sprout production remains slightly limited, though overall quality is good. The market is expected to remain steady with potential upward movement next week.

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



Carrots

Bakersfield is currently the primary growing region, with good sizing and strong availability across all carrot packs.

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 this week, with the market expected to stay steady heading into next week.

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



Celery

The market remains steady, with production currently coming from Salinas, Santa Maria, and Oxnard. All sizes are available, with 24-count sizing showing the strongest availability. Shippers continue to be flexible, so promote as much as possible. Overall quality remains strong industry-wide.

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 Ruby grapefruit is available, with peak sizing at 48-count. Fruit is shipping from 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

The lemon market remains elevated due to limited availability and strong demand. Supplies are expected to stay tight through the month, keeping pricing firm. District Two (Ventura County/Oxnard) is in full production and providing the majority of supply, with limited support from imports on both coasts.

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



Citrus (Limes)

Crossings remain steady with promotional pricing on smaller sizes, while larger fruit and high-quality limes remain limited and command a premium. Supplies are expected to hold for the next 3-4 weeks before tightening, as heat and humidity continue to impact pack-outs and overall quality.

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

Valencias are now the primary variety, with limited Navel supplies remaining at a premium compared to new-crop Valencias. Peak sizing mirrors the Navel season, with small fruit remaining extremely tight. While some smaller sizes are available due to reduced demand from schools being out, availability is not expected to continue throughout the Valencia season, as small fruit supplies are expected to remain limited.

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

Supply is improving with Baja, Mexico, New Jersey, and local regions supporting stable, promotional markets. Recent heat and rain may impact New Jersey quality, but multi-region production should help minimize disruptions.

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

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

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Eggplant

Georgia has finished, and Carolina production remains limited during the transition. Supplies are expected to stay tight until larger summer harvests begin in early August.

Commodity/Region	Supply	Price	Quality
California (May - October)	Light	\$\$\$	Good
Ohio/NC/MI (June - September)	Light	\$\$\$	Good



Garlic

Shipments transitioned to Mexican peeled garlic on June 22, 2026, and will continue through late July to early August when new California crop becomes available.

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Steady	\$\$\$	Good
Bakersfield, California (Year Round)	Steady	\$\$\$	Good
Gilroy, California (Year Round)	Steady	\$\$\$	Good



Grapes

This is the strongest time of year for grapes, with excellent quality and strong supply loading from Fresno through Bakersfield. Most shippers are peaking on large and extra-large red and green seedless varieties. The market is expected to remain steady with reasonable pricing barring any weather-related disruptions.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Green onion supplies remain strong overall, with the market expected to stay steady into next week, weather permitting.

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



Kale

Kale supplies and quality remain strong, with market conditions expected to stay steady 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

Favorable weather and schools being out nationwide have created strong supplies across the industry. Suppliers continue to be flexible, so promote as much as possible. Good sizing and weights are expected throughout the week. Value-added items remain at normal pricing and are expected to hold through the month. Current production is coming from the Salinas Valley and Southern California.

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



Lettuce Leaf

Romaine, green leaf, and red leaf supplies will remain excellent throughout the week, keeping the market flat. Romaine hearts are currently elevated on contracts but are expected to ease by the end of the week. No escalations are in place for value-added leaf items and are expected to remain stable through the month. Overall quality continues to be above average, with minimal fringe and tip burn reported.

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



Lettuce Tender Leaf

Spinach, arugula, and spring mix supplies remain strong with good quality and are expected to support normal business needs.

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



Melon (Cantaloupe)

Domestic cantaloupes are transitioning from Central California into new fields in the Westside region. Fruit is peaking on 9-count with strong supplies and promotional opportunities available on new-crop product.

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

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

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Commodity Updates



Melon (Honeydew)

Offshore and Mexican honeydews are finished for the season, leaving domestic production as the primary supply source. California Desert growers were impacted by white fly, causing an earlier-than-expected shutdown and a temporary supply gap before Central California was ready. Contracts remain a priority but are being prorated, with sizing substitutions likely. Tight supplies are expected through the week of 7/6.

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



Melon (Watermelon)

Watermelon demand remains steady following the holiday ADS period. Supplies are available from California, the Southeast, and Texas.

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



Mushroom

Due to new government duties, pricing is expected to increase as demand continues to exceed available supply.

Commodity/Region	Supply	Price	Quality
Nationwide	High	\$\$\$	Excellent



Onions

ALERT

Onions will continue loading from Central California and New Mexico through the remainder of the summer onion season. Lower yields are keeping supplies tighter and pricing elevated, with conditions expected to remain until Pacific Northwest production begins. Freight continues to be a major market driver, while winter-over supplies remain available from Washington.

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



Pears

Washington Anjou supplies are very limited, with only a few packers still shipping. California Bartletts have started, but the overall crop is lighter than last season and sizing is trending large. Retail bag programs and larger fruit sizes are expected to keep foodservice supplies tight until Washington production begins in early August.

Commodity/Region	Supply	Price	Quality
	Steady	\$\$\$	Good

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

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Commodity Updates



Pineapples

ALERT

Costa Rica supplies remain steady through July, while Mexico volumes decline as production moves past peak. Larger sizes are expected to improve late July, with 6- and 7-count crowned fruit increasing. Crownless 8- and 10-count and organic supplies remain limited.

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



Potatoes

ALERT

Large potato sizes are tightening as the season progresses and pack-outs decline. Warm winter conditions have impacted storage, reducing usable supply and requiring additional lead time for orders. Washington potatoes are showing excellent quality, with mid-sizes peaking while large and smaller counts remain limited. Florida colored potatoes will continue for another week or two, with yellow varieties tight and reds in a better position. North Carolina sweet potato supplies remain limited until new crop begins.

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



Squash

Supplies remain steady with strong quality from California, North Carolina, and New Jersey. Yellow squash remains higher priced, while New York production is starting and expected to increase in the coming weeks.

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



Stone Fruit

Peaches, plums, and nectarines are in full production with excellent quality and favorable pricing. Small plums are especially promotable. The Chilean kiwi market remains steady and will continue as the primary source until California resumes in October. Washington cherries are expected to finish by the end of the month.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley	Steady	\$\$\$	Good



Tomatoes

Tomato markets remain firm due to tight supplies and steady demand, with Roma and greenhouse tomatoes facing the most pressure. Southeast production is increasing, which should improve availability in the coming weeks, though freight will continue to impact sourcing decisions.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Baja California (Spring/Summer - November)	Steady	\$\$\$	Good
California (July - October)	Light	\$\$\$	Good

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

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Weather Updates



CALIFORNIA

Strong high pressure will continue bringing above-average temperatures through the first part of the week. Coastal areas will see highs in the upper 60s to mid-70s, while inland regions range from the upper 70s to mid-90s, with areas south of Soledad reaching the low 90s to 105. The high will shift east later in the week, bringing increased humidity and warmer overnight temperatures, while daytime highs remain above normal.



MEXICO

Isolated to scattered showers and thunderstorms are expected through midweek, with rainfall totals generally ranging from 0.05" to 0.30" and locally higher amounts possible. Temperatures will remain seasonably warm, with highs in the low 70s to low 80s and overnight lows in the mid-50s to low 60s.



FLORIDA

Isolated to scattered showers and thunderstorms are expected through midweek as a frontal boundary moves through the area. Temperatures will remain warm, with highs in the upper 80s to mid-90s and lows in the mid-70s to low 80s. The extended outlook calls for above-normal temperatures with near to slightly above-normal rainfall.



ARIZONA

Scattered monsoon showers and isolated thunderstorms are expected daily through Friday, July 17. Drier air moves in Saturday-Sunday, July 18-19, with monsoon activity potentially returning around Wednesday, July 22. Temperatures will remain above normal, with morning lows continuing to reach the 80s.

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

Freight Updates



This week freight sees DOT back hosting yet another enforcement sweep for 2026, “Operation Safe Driver Week”. This most recent event is having similar effects as May, causing increase in rates, and driving truck availability down, especially in California. Up next is ‘Brake Safety Week’ slated to take place August 23-29.



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

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

	06/29/26	07/06/26	07/13/26	Change from		
				2 year ago	year ago	week ago
U.S.	4.668	4.578	4.796	↑ 0.970	↑ 1.038	↑ 0.218
East Coast (PADD1)	4.758	4.694	4.894	↑ 0.986	↑ 1.101	↑ 0.200
New England (PADD1A)	5.248	5.220	5.189	↑ 1.080	↑ 1.220	↓ -0.031
Central Atlantic (PADD1B)	5.190	5.146	5.204	↑ 1.137	↑ 1.251	↑ 0.058
Lower Atlantic (PADD1C)	4.547	4.477	4.748	↑ 0.919	↑ 1.032	↑ 0.271
Midwest (PADD2)	4.583	4.458	4.659	↑ 0.914	↑ 0.926	↑ 0.201
Gulf Coast (PADD3)	4.283	4.225	4.546	↑ 0.995	↑ 1.143	↑ 0.321
Rocky Mountain (PADD4)	4.602	4.484	4.600	↑ 0.850	↑ 0.887	↑ 0.116
West Coast (PADD5)	5.528	5.425	5.550	↑ 1.100	↑ 1.052	↑ 0.125
West Coast less California	4.962	4.864	5.052	↑ 1.022	↑ 0.930	↑ 0.188
California	6.180	6.073	6.126	↑ 1.194	↑ 1.194	↑ 0.053

*prices include all taxes

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

Crop Updates



Heat, Humidity, and the Handoff

Warm and humid weather is driving the story in the Salinas Valley this week. These temperatures may not look extreme compared to other parts of the country, but our valley is not built for warm, sticky weather. When humidity hangs around and daytime highs climb, quality issues show up quickly in row crops and berries.

Excellent supplies of lettuce and leaf are in the forecast, but internal burn is starting to show up in some lots. Packers can trim outer leaves at harvest to clean up visible defects, but burn deeper inside the head is much harder to sort out, especially on iceberg and romaine. Baby leaf items remain in good supply overall, with spring mix, spinach, arugula, and baby kale showing healthy color, texture, and sizing. Shelf life will need to be watched closely as humidity stays in the forecast.

Strawberries are feeling the heat. Salinas and Watsonville are seeing smaller berry sizing, overripe fruit, and excessive bruising tied to the warm, humid conditions. Crews are working to keep the pack clean, but some of these issues will be more present after arrival than at shipping. Reduced shelf life should be expected. Santa Maria is dealing with similar weather and quality challenges. Higher freezer demand is giving growers another outlet, which is helping keep the fresh market firm.

Blueberry supplies are moving in the opposite direction. Oregon and Washington are producing good volume, and Michigan will continue increasing over the next several weeks after a slower, weather-affected start. New Jersey is still producing light volume. Markets are trending lower as supply improves across multiple regions.





Crop Updates

Blackberries remain one of the more limited berry items. The industry is still working through planting and transition gaps, with relief expected in early August as Mexico, Oregon, and California's Central Coast increase volume. Demand is outpacing supply, and markets remain elevated. Raspberry supplies are improving as additional fruit comes out of Baja, and markets are softening.

Melons are finally turning the corner, especially on cantaloupe. Production out of Firebaugh and the broader Westside is picking up, and the market has started to settle from the record highs seen over the past few weeks. New fields are producing very good quality, with a straw-colored external appearance, strong flavor, and a larger sizing profile. Cantaloupe supplies will remain stronger for the foreseeable future, but smaller melons will remain limited and carry a premium.

Honeydews are improving a bit more slowly. Production is increasing, but the pipeline has been empty long enough that pricing is still elevated. Sizing is peaking on 5s, with smaller honeydews much harder to come by. Quality has been very good, with clean external appearance and strong brix levels.

It is the dog days of summer, and there is still no better way to enjoy it than with a fresh salad. Lettuce and leaf supplies are strong, but quicker turns will be important as heat and humidity keep shelf life in focus. Melons are improving, berries are moving in different directions, and schools will be back in session before we know it.

