

# The Source

## Commodity of the Month - Tender Leaf

### MARKET ALERTS

**Asparagus:** Asparagus sizing is tight on both coasts, with better availability on smaller sizes. Prices are rising as supplies remain limited. Peru faces slow growth from cool weather; Mexico is in transition, impacted by heat and rain. Tight supplies expected to continue.

**Blackberries:** Availability remains tight, but additional volume from Mexico and Oregon is expected to help ease the current shortage in the coming weeks.

**Raspberries:** Supplies from Central Mexico and Baja remain sporadic. Markets are expected to strengthen as demand increases with schools returning nationwide.

**Strawberries:** Salinas and Watsonville production is declining. Santa Maria has started, Oxnard in 2–3 weeks, but volumes won't offset losses until late August. Demand is rising, pushing prices higher.

**Brussel Sprouts:** Sprout supplies remain tight with high prices. Salinas production is slowly improving, but quality issues persist.

**Lemons:** Markets are strong with limited small sizes. Only District 2 is harvesting. Quality is fair; demand and lower imports keep prices elevated.

**Limes:** Prices are up on low yields and light TX crossings. Small limes tight; larger sizes more available. Higher prices expected through August.

**Lettuce (Iceberg):** Market is inconsistent with a \$5–\$6 price gap. Salinas weights up; market may soften. Some deals available, but value-added items remain escalated.

**Pineapple:** Crownless pineapples in high demand, low supply. Tariffs start 8/7/25. Storms in Costa Rica may affect orders.

**Potatoes:** Idaho 40–70 count tight through August; Burbanks available. Prices rising. New crop starts 8/11 with strong quality. WA new crop began 7/28.

## AUGUST 6, 2025

### CROP UPDATES

#### Northwest Harvest Update:

Onion and potato harvests are underway in WA, OR, and ID with strong early volume and solid quality. Jumbo and colossal onions expected next week. Potatoes starting smaller but sizing is improving. Overall outlook is strong — now's a good time to plan ahead for fall. [Read more](#)

### WEATHER

**California:** High pressure builds Wednesday, weakening the marine layer and warming inland temps. Lows in the mid-40s to upper 50s; highs range from mid-60s coasts to 102°F south of Soledad.

**Mexico:** Isolated showers Wednesday, with scattered showers and storms possible Thursday and Friday. Brief break Saturday, then more showers Sunday. Rainfall mostly 0.05"–0.30", locally higher in storms. Warm through Thursday (highs upper 70s–80s), cooling slightly Friday–Sunday. Lows in the mid-50s to low 60s.

**Florida:** Weak flow Wednesday–Thursday will allow sea breezes to trigger showers and storms. A slow-moving front, fueled by offshore moisture, lingers through the weekend. Some tropical development is possible later in the week.

**Arizona:** Low desert temps will run well above normal this week under strong high pressure. Highs Wednesday: 112–115°F in Arizona valleys, 115–120°F in SE California. Phoenix may break its 114°F record. Lows rise from mid-70s to mid-80s by Thursday. Southerly winds increase to 20–25 mph gusts by Friday and Saturday mornings.

### IN PEAK SEASON



### FREIGHT

Freight this week remains steady as summer season continues across the country. With the slower summer markets upon us, now is a great time to set up a freight program that works for you!



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# Commodity Updates



## Apples

The market remains mostly steady, with slight increases in some varieties. New crop apples are beginning to arrive, with early Gala and Ginger Gold varieties coming in this week.

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



## Asparagus

**ALERT**

Sizing remains tight on both coasts, with limited availability of Large, Extra Large, and Jumbo sizes. Smalls and Standards will be more readily available. Overall market prices are expected to rise due to limited supplies. In Peru, cooler weather is slowing growth, while Mexican production is in transition from Central Mexico to Baja and Guanajuato, impacted by heat and rain. Expect asparagus supplies to remain tight over the next couple of weeks.

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



## Avocados

Markets on 48ct, 60ct, and 70ct are improving as the Flora Loca crop ramps up. Shippers are keeping Flora Loca and late Normal crop fruit separate. The Normal crop is nearly done, with Flora Loca taking over. Dry matter is in the low/mid-20s, so ripening will take a bit longer. Fruit is very clean with minimal #2s, typical for this time of year. California's season is slowing, expected to end in a few weeks. Offshore fruit continues arriving on both coasts but will taper off next month.

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



## Bell Peppers

Improved supplies, along with reduced demand, are helping to stabilize the market as eastern production ramps up. Quality remains strong out of California, with coastal regions now underway, including Santa Maria, Oxnard, and Hollister.

Commodity/Region	Supply	Price	Quality
California (May - June)	Steady	\$\$\$	Good
Ohio (Jun - Sept)	Steady	\$\$\$	Good

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

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# Commodity Updates



## Berries (Blackberries)

**ALERT**

Availability remains tight, but additional volume from Mexico and Oregon is expected to help ease the current shortage in the coming weeks.

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

Product is readily available from the Pacific Northwest, Michigan, and New Jersey. The Peruvian import season is just getting underway, with small volumes beginning to arrive at ports in Los Angeles and along the East Coast.

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



## Berries (Raspberries)

**ALERT**

Supplies from Central Mexico and Baja remain sporadic. Markets are expected to strengthen as demand increases with schools returning nationwide.

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

**ALERT**

Production continues to steadily decline out of the Salinas and Watsonville areas. New crop fruit has started in Santa Maria, with Oxnard expected to follow in two to three weeks. However, volumes from these new regions will not be sufficient to offset the northern decline until late August, likely leading to higher market prices. Meanwhile, demand is strengthening.

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

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Only the Finest Berries™



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# Commodity Updates



## Broccoli

Broccoli supplies and quality remain strong across all growing regions, with similar conditions 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 in Salinas is gradually increasing but still lags behind expectations. Quality challenges persist, including elongated cores and stems, minor 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 has shifted to the Cuyama/Lancaster area and will continue through November. Quality and sizing remain strong. Please remember to 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 in Santa Maria, Mexico, and the Salinas Valley are all very good, with quality reported as strong. Expect the market to remain steady 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 are strong in Salinas, as well as Oxnard and Santa Maria, to start the week, with all sizes available. Shippers are flexible on volume orders, so promote aggressively. Aside from minor seeder presence, quality is very good industry-wide. Expect steady pricing and availability throughout the week.

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, shipping out of 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 are strong on all sizes, with only District 2 (Ventura/Oxnard) growing. Sizes 165ct and smaller are very limited. Choice grade dominates; less Fancy due to conditions. Quality is fair, with softer fruit and early decay typical for the season. Coastal winds and moisture affect fruit, but shippers are culling compromised lots. Markets are higher than last summer due to increased demand and lower imports.

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



## Citrus (Limes)

**ALERT**

Prices are rising due to lighter supplies crossing through South Texas. Low yields in the growing regions are driving the increase. Expect higher prices throughout August, with smaller limes becoming increasingly limited while larger fruit remains more available.

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)	Light	\$\$\$	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 continues to produce strong volume with good quality. With steady supply expected through August, it's an excellent time to promote.

Commodity/Region	Supply	Price	Quality
Baja California (May - October)	Steady	\$\$\$	Good
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

Eastern supply is light to moderate but steady, with good quality. Western supply remains limited, though Washington is expected to ramp up soon. The market remains balanced with current demand.

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



## Garlic

The new California garlic crop is progressing with good quality, while Mexican supplies continue to complement 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)

The market is mostly steady at lower prices. Flames and Ivories remain the bargain varieties, while newer varieties command a slight premium. Sizing is large, and quality has been excellent.

### Grapes (Green)

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

### Grapes (Red)

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



## Green Onions

Green onion supplies are very good, with quality remaining strong. Expect these conditions to continue 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

**ALERT**

This market is unusual, with a price gap of five to six dollars depending on the shipper. Weights in Salinas have increased, averaging 39–44 pounds. The market is expected to soften later in the week. Some shippers are flexing, so sharper deals are available. However, all value-added lettuce items remain escalated.

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

Romaine, along with green and red leaf, remains steady in the marketplace. Overall quality continues to be above average from most shippers, with only minor tip and fringe burn reported. Weights and leaf length remain favorable. Expect steady supplies of romaine hearts throughout the week in Salinas.

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

All tender leaf items are showing good quality and strong supplies. Expect more of the same heading into next week.

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

The domestic cantaloupe market has normalized on the West Coast, with regional growers meeting demand. Warm weather is producing high-quality cantaloupes, peaking on 9s and 12s with Brix levels between 13 and 16. Volume deals are available.

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 has normalized from the West Coast. Regional growing regions have pushed demand out west. The warm weather is producing high quality Honeydew and they are peaking on 9 and 12s with Brix levels in the 13-16 range. Volume deals available

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 in NC, Indiana, Texas, and Central California. Due to quality, demand has shifted west. Prices are expected to stay low, especially on larger fruit, until supplies tighten with increased demand.

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

Supplies remain steady with promotable volumes available.

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

Onions are available from CA, WA, ID, NM, and TX, with a mix of US and Mexican crops in NM. Demand remains strong as Mexican yields decline. NM supply is expected to end in 1-2 weeks, CA by month's end. Red and white onions have stabilized. Idaho has limited supply this week; WA supply is good.

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

California Bartletts are in full production, with a strong crop and quality expected to be good. California Bosc and Red Pears are also available in good volume. Some Washington shippers plan to start new crop Bartletts as early as next week.

Commodity/Region	Supply	Price	Quality
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Sacramento Valley (July-September)	High	\$\$\$	Excellent
Hood River, Oregon (August-July)	Light	\$\$\$	Excellent
Yakima, Washington (August-July)	Light	\$\$\$	Excellent

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

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# Commodity Updates



## Pineapples

**ALERT**

Crownless pineapples remain in high demand with limited inventory. Tariff rates for certain countries will take effect on 8/7/25. Heavy thunderstorms are currently impacting growing regions in Costa Rica, so expect potential substitutions and order changes.

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

**ALERT**

The Idaho market remains tight on 40-70 count through the end of August. Burbanks will be available throughout the summer. Short-term pricing increases are expected in both ID and CO. New crop out of Idaho begins the week of 8/11, with contracts ramping up by 8/25. Quality reports are excellent, thanks to ideal growing conditions. Washington's new crop started the week of 7/28 and is also showing strong quality.

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

Overall supply is good, with Michigan strong and zucchini solid. Yellow squash is slightly tighter due to scarring. Baja production is picking up as the Washington season has ended, with west coast availability coming from Santa Maria and Baja.

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

Peaches, plums, and nectarines are currently in good supply, with the market remaining steady. Specialty varieties like donut peaches and pluots are also actively in production. The imported kiwi market continues to hold steady at higher price levels and is expected to remain that way until California's season begins in October.

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

Roma Tomatoes: Steady supply from TN, CA, and Mexico; Midwest volume rising soon. Quality strong. Round Tomatoes: Light but improving from TN and CA; Mexico quality steady. Grape Tomatoes: Eastern supply light; NJ, MI, and Mexico stabilizing availability.

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

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# Weather Updates



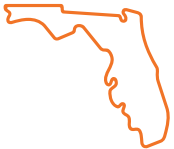
## CALIFORNIA

High pressure strengthens Wednesday, weakening the marine layer and warming temperatures—mainly inland. Morning lows range from mid-40s to upper 50s. Daytime highs will be mid-60s to low 70s at the coast, upper 70s to low 90s in coastal valleys, and mid-90s to 102 south of Soledad.



## MEXICO

Isolated showers are expected Wednesday, with isolated to scattered showers and thunderstorms possible Thursday into Friday. Rainfall totals will generally range from 0.05" to 0.30", with higher amounts possible in some thunderstorms. Saturday will see a lull in showers, followed by isolated to scattered showers again Sunday as moisture returns. Temperatures will be warm through Thursday, then slightly cooler Friday through Sunday. Highs will range from the upper 70s to upper 80s through Thursday, dropping to the low 70s to low 80s Friday through Sunday. Lows will stay in the mid-50s to low 60s over the weekend.



## FLORIDA

From Wednesday into Thursday, weak synoptic flow will enable sea breeze circulations to produce showers and thunderstorms across the state. A slow-moving frontal boundary will linger through the weekend, fueled by moisture from a low-pressure system off the coast. There is also some potential for tropical development from this system later in the week.



## ARIZONA

Temperatures across the low deserts will run well above normal this week under strengthening high pressure and low humidity. Highs are expected to reach 112-115°F in most Arizona valleys on Wednesday, with 115-120°F in southeast California. The greater Phoenix area may break its previous record of 114°F for the date on Wednesday. Morning lows will be in the mid-70s to low 80s Tuesday, warming to the low-mid 80s by Thursday. Light southerly winds Wednesday and Thursday will strengthen to gusts of 20-25 mph Friday and Saturday mornings.

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



# Freight Updates

Freight this week remains steady as summer season continues across the country. With the slower summer markets upon us, now is a great time to set up a freight program that works for you!



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

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

	07/21/25	07/28/25	08/04/25	Change from	
				week ago	year ago
U.S.	3.812	3.805	3.800	↓ -0.005	↑ 0.045
East Coast (PADD1)	3.821	3.812	3.807	↓ -0.005	↓ -0.023
New England (PADD1A)	3.984	3.974	3.992	↑ 0.018	↓ -0.081
Central Atlantic (PADD1B)	3.975	3.945	3.958	↑ 0.013	↓ -0.033
Lower Atlantic (PADD1C)	3.747	3.746	3.733	↓ -0.013	↓ -0.009
Midwest (PADD2)	3.795	3.794	3.792	↓ -0.002	↑ 0.063
Gulf Coast (PADD3)	3.476	3.454	3.442	↓ -0.012	↑ 0.006
Rocky Mountain (PADD4)	3.770	3.781	3.793	↑ 0.012	↑ 0.091
West Coast (PADD5)	4.542	4.546	4.540	↓ -0.006	↑ 0.184
West Coast less California	4.176	4.189	4.188	↓ -0.001	↑ 0.237
California	4.963	4.957	4.946	↓ -0.011	↑ 0.125

\*prices include all taxes

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



# Crop Updates

## Harvest Heat Up in the Northwest

We're officially in the thick of the late summer harvest, and our Northwest staples are starting to take shape. Onions and potatoes are leading the charge, with growers reporting strong early starts and promising conditions across the region.

Onion harvest is ready to ramp up in Washington, Oregon, and Idaho. Early loads out of the Northwest are coming in strong, with plenty of jumbo and colossal sizes expected to ship next week. Quality looks solid so far, and volume will steadily increase throughout the month. California's San Joaquin Valley and New Mexico are still shipping a good supply for the next few weeks, but both regions are beginning to wind down. Northwest onions are showing thinner skins at the start of the season. As curing progresses, we'll see those skins toughen up and quality improve from good to excellent.

Potato harvest is gaining momentum in Idaho, Colorado, and Washington. The early crop is leaning toward smaller sizes, but sizing should balance out as harvest continues. Quality is already looking better than last year. Some growers are keeping an eye out for hollow heart in later storage lots, which can develop after temperature swings. A bit of skinning is showing up in early russets, but that should fade as the crop sweats out excess moisture. It's also common to see a white blush or fuzz on new crop potatoes. This is just excess starch left behind from the sweating process, and it washes off easily without affecting quality.

All signs point to a strong start to August. We'll be keeping a close eye on sizing and weather as harvest continues into the fall. The outlook remains encouraging, and now is a good time to get ahead of fall demand and lock in your programs.



**JOEY PIEDIMONTE**  
**SOURCING MANAGER**