

# The Source

## Commodity of the Month - Potatoes

### MARKET ALERTS

**Bell Peppers:** Supplies are light nationwide. Georgia's season is done, North Carolina is low, and Central Mexico's weather affects red bell pepper crossings. Demand shifts to California, where yields are low. Expect active markets for two weeks until new areas come online.

**Blackberries:** West Coast production is slowly increasing toward mid-July, with Georgia now producing. Oregon's PNW season has started lightly, while Central Mexico's quality is poor.

**Broccoli:** Broccoli supplies have started to tighten up in all areas. Demand has increased due to all the erratic weather in Mexico. Look for this market to gradually go up as we move into next week.

**Brussels Sprouts:** Brussels Sprout supplies are tight due to Mexico's weather issues, leading to lower yields. Demand is shifting to already limited Oxnard supplies, with Salinas not starting until late July.

**Cauliflower:** Cauliflower supplies have started to tighten in all areas. Look for this market gradually go up going into the weekend.

**Lettuce (iceberg):** Demand exceeds supply as Mexico struggles with lettuce production, leading processors to buy acreage in Salinas and Santa Maria. Expect light supplies and higher prices this week. Contracted lettuce weights will average 34-38 pounds, with reports of misshapen heads.

**Squash:** Markets are up as low production is reported from Baja, Santa Maria, and Fresno. The Northwest has good supply, while the East transitions before northern programs start.

**JULY 2, 2025**

### CROP UPDATES

Tropical activity continues in the Eastern Pacific as Hurricane Flossie weakens and moves offshore near southern Baja over the next few days. Another system is likely to develop into a tropical depression near southwestern Mexico next week. Meanwhile in the Gulf of Mexico another tropical system is anticipated to form off the gulf coast of Florida over the weekend into early next. [Read more](#)

### WEATHER

**California:** A weak upper low will keep moderate marine layer conditions and temps near average. Expect morning lows in the 40s-50s and daytime highs upper 50s-90s.

**Mexico:** Isolated to scattered showers and t-storms through Thursday, with 0.10"-0.35" rainfall expected. Drier Friday to Sunday, with highs in the 60s to 80s and lows in the 50s to 60s.

**Florida:** Scattered showers and t-storms will persist over the next five days, with 0.15" to 0.35" of rain expected. Winds may gust near 20 mph. Highs in the 80s to low 90s.

**Arizona:** Temps near record highs Tuesday, hitting 112-115 in lower desert valleys. Gradual cooling expected Wed-Fri with possible showers, especially in Phoenix Wednesday evening.

### IN PEAK SEASON



### FREIGHT

Forth if July holiday sees freight markets steady in the Foodservice sector. Expecting that pattern to continue into the remainder of July. Now is a great time to create your perfect freight program with Pro\*Fresh Logistics!

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# Commodity Updates



## Apples

The apple market is still steady on mediocre volume. Most shippers have reduced packing days due to labor being diverted to the cherry crop.

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



## Asparagus

Asparagus supplies on both coasts have improved with Peru and Mexico production has drastically improved. Look for this market remain on the lower side for the rest of this week.

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



## Avocados

Markets on 48ct have gotten a tad better; 60ct and 70ct sizes have strengthened as we get near the end of the Normal crop, along with rains helping increase the sizing. About 1-2 weeks left of the current Normal crop; Flora Loca is the next crop. Looking to peak on 48/60ct right now. Nothing for certain just yet, but peak sizing could stay in this range when it's time to begin harvesting. California season is starting to slow down a little bit. Offshore fruit arriving on both coasts.

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



## Bell Peppers

**ALERT**

Georgia's season is winding down, with most growers finishing soon. New supply is expected from the Northeast and Midwest. Western supply is strong from Coachella and Bakersfield, with Washington starting soon. Limited colored pepper supply from Canada and Mexico has shifted demand to California, pushing prices up during the Coachella-to-Bakersfield transition.

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

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

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# Commodity Updates



## Berries (Blackberries)

**ALERT**

West Coast production has begun in a light way with numbers expected to increase steadily moving into mid-July. Georgia is producing now as well. The PNW Oregon season has started in a light way. Central Mexico is still crossing numbers but the quality has been poor.

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

We have production going in Oregon, Washington, New Jersey, and North Carolina. Michigan is still a week or two away.

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

West Coast production is starting this week. Baja and CMex are still going. Demand is soft and some volume deals are being offered.

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



## Berries (Strawberries)

Production is steady against strong demand in the Salinas and Watsonville areas. We will continue to see light numbers coming out of The Santa Maria area until the second round of plantings begin to produce in two more weeks. Oxnard will also begin in about two weeks.

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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Only the Finest Berries™



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# Commodity Updates



## Broccoli

**ALERT**

Broccoli supplies have started to tighten up in all areas. Demand has increased due to all the erratic weather in Mexico. Look for this market to gradually go up as we move into next week.

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



## Brussel Sprouts

**ALERT**

Brussels Sprout supplies remain tight. Mexico has been dealing with erratic weather including rain, hail and wind – which has led to quality issues and lower yields. With Mexico supplies being tight, demand is now switching to Oxnard. Oxnard supplies have been limited already and is unable to keep up with demand. Salinas production will not start until the end of July.

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 is going strong and will run through the end of July. Will then move to the Summer season in the Cuyama/Lancaster area, which will run through November. No issue with current quality and sizing. Jumbo market has tightened a little bit due to other growing regions finishing.

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

**ALERT**

Cauliflower supplies have started to tighten in all areas. Look for this market gradually go up going into the weekend.

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



## Celery

This market is steady to begin the week. Large sizing has good availability from most suppliers. Northern and southern CA currently is in production of this commodity. Minor seeder has been reported . The overall quality continues to be above average.

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 and are shipped out of 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)

Markets continue to strengthen across the board. District 1 (San Joaquin Valley) is finished, with District 2 (Ventura County/Oxnard) now the main growing region. 165ct and smaller sizes are very limited. Choice grade will dominate this crop, as normal, with less Fancy grade available due to growing conditions. Offshore fruit into the US has been delayed until late-July/early August. Mexico is projected to ramp up mid-July.

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)

The lime market is steady with improved availability on large sizes due to rain in the growing regions of Mexico. More rain may briefly limit crossings, but overall July supply looks strong. Some quality issues like oil spots and rot are showing up in transit, caused by heat and humidity during harvest.

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

Valencia's are the main variety. Vals are currently peaking on 113ct/138ct as this season gets underway and will size up as the season progresses. At this point, we are seeing around 48hrs of gas times to help color up the Valencia's. Brix are in the 12-13 range and fruit is eating very well.

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

Steady supply out of Baja with good quality. Due to weather out east supply is light as we crops transition further north. Demand has shifted to Baja as McAllen also has light supplies due to rain in Central Mexico.

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

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

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# Commodity Updates



## Eggplant

As harvests wrap up in the Southeast, sourcing is shifting westward. California crops are currently providing steady supplies with consistently high quality.

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



## Garlic

Garlic quality from Mexico remains fair, with moderate yields expected to continue into next week.

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)

Mexican grape shippers have mostly recovered from the storm damage and are dropping prices to spur movement. California's central valley district will start this week and next. bringing additional downward pressure to the market.

### Grapes (Green)

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

### Grapes (Red)

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



## Green Onions

Supplies remain slightly on the tighter with the market slowly going up. Look for this market go gradually go up going into the weekend.

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



## Kale

Kale supplies are steady and quality is good. Look for this market to remain steady going 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**

Demand exceeds supplies. Mexico has been unable to produce good lettuce so processors have been buying up acreage in the Salinas valley as well as Santa María. This is the direct reason for shortages in the industry. Expect light supplies all this week. Escalation on value added items are on second tier levels and this will continue for the week. Contracted carton lettuce is escalated as well. Expect lighter carton weights to be 34-38 pounds on average. Misshapen heads are also reported from multiple suppliers.

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

Supplies of romaine as well as green and red leaf are tighter in availability compared to last week. Romaine hearts are limited as well. All previous mentioned items are active, industry wide. Contracted romaine hearts as well as romaine are price escalated. This will continue throughout the week. Fringe and tip burn has been reported upon arrivals as well as lighter weights and sizing on all leaf items.

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

Good overall quality on all tender leaf items. Some discoloration, burn and insect damage can occasionally appear. Look for supplies to stay steady going 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 Cantaloupe market is strong due to retail ads for the holiday. The warm weather is producing high quality Cantaloupes and they are peaking on 9 with Brix levels in the 13-16 range. Suppliers are currently transitioning from the desert to Central California.

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 Honeydew market is strong due to retail ads for the holiday. The warm weather is producing high quality melons and they are peaking on 5 with Brix levels in the 13-16 range. Suppliers are currently transitioning from the desert to Central California. Nogales melons are very limited with limited availability.

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 FL now and in Central California. Mexican watermelons are all but done. Very aggressive pricing available and suppliers are prepping for the upcoming Holiday. Volume deals are available

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

Excellent supplies and promotable volumes remain available.

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

Onions are currently available in California (CA) and New Mexico (NM). In CA, the desert season has ended with onion movement shifting to Central CA. There is a mix of US and Mexican crop available in NM. Quality is a concern in NM due to rain in NM and Mexico over the last two weeks. Onion seasons in Texas and Georgia are coming to a close.

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 bartlett pears will begin harvest late next week. The crop is expected to be large and of good quality. Hopefully this will bring some energy to a mostly dull pear market. Washington storage crop Anjous remain steady with light supplies.

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

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

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# Commodity Updates



## Pineapples

Pineapple supplies are more available this week and substitutions are very minimal; Crownless Pineapples remain on high Demand.

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

The ID market is tight on 40-70 count until end of August. Burbank will be available through the summer. Pricing in ID and CO is expected to increase in the short term. DLVD pricing is currently driving the market. New plantings are already in the ground in Eastern Idaho, with harvest expected to begin in mid-August. Demand on red color potatoes is stronger while yellows remain stable.

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



## Squash

**ALERT**

Markets are higher supplies out west are experiencing a low production window out of Baja, Santa Maria, and the Fresno area. There is good supply out of the northwest. The east is in a transitional period waiting for northern programs to start. Expect more growers to come online in the coming weeks.

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



## Stone Fruit

Plums, Nectarines, and Peaches continue to increase in volume. Small peaches are somewhat scarce due to bag programs and the large size profile of the varieties currently in production. The kiwi market is up slightly. Washington cherries are supply exceeds and it is a buyer's market.

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

Demand is a bit higher especially on grapes. Grapes are experiencing a slight gap across growing regions. Still decent supply of rounds and romas however vine-ripened are somewhat limited through the McAllen area due to weather in Central Mexico. Tomatoes are available out of Baja, CA, TX, and the Carolinas. TN will get going this weekend in a light way with their summer crop.

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

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

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# Weather Updates



## CALIFORNIA

A weak upper low lingers over the area through mid week keeping moderate marine layer conditions and near to slightly above average temps. Morning lows will be in the mid 40s to mid 50s with daytime highs in the upper 50s to upper 60s near the coast, upper 70s to mid 80s in the coastal valleys and upper 80s to mid 90s south of Soledad. The marine layer deepens cooling max temps to the mid 70s to low 80s in the coastal valleys and upper 80s to low 90s inland.



## MEXICO

Isolated to scattered showers and t-storms through Thursday. Rainfall totals will range from 0.10" to 0.35" in most showers that do occur but higher totals are likely within some t-storms. Shower activity will become more isolated for Friday with mostly dry weather more likely over the weekend. Highs in the upper 60s to upper 70s on Wednesday and low 70s to low 80s for Thursday through Sunday. Low temps in the mid 50s to mid 60s through Sunday morning.



## FLORIDA

Scattered showers and t-storms will continue over the next five days. Rainfall totals will range from 0.15" to 0.35" in most showers with higher totals likely within t-storms. Winds will gust near 20 mph through Friday over southeast Florida and the Tampa Bay area. Highs in the mid 80s to low 90s through Sunday. Lows in the low-mid 70s through Sunday morning. A frontal boundary is expected to stall over the region and possibly be a focal point for a tropical system to develop towards the latter half of the week.



## ARIZONA

Temps hover near record highs Tuesday, topping out in the 112-115 range over much of the lower desert valleys following morning lows in the low-mid 80s. Gradual cooling expected Wednesday through Friday as some monsoon moisture drifts into area along with increased cloud cover. Scattered showers or isolated thunderstorms are possible starting late Tuesday in parts of central Arizona. For the Phoenix metro area, Wednesday evening should best odds of measurable rainfall. Yuma Co. and southeast California are not likely to be impacted.

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

# Freight Updates



Forth if July holiday sees freight markets steady in the Foodservice sector. Expecting that pattern to continue into the remainder of July. Now is a great time to create your perfect freight program with Pro\*Fresh Logistics!



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

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

	06/09/25	06/16/25	06/23/25	Change from	
				week ago	year ago
U.S.	3.471	3.571	3.775	↑ 0.204	↑ 0.006
East Coast (PADD1)	3.525	3.621	3.790	↑ 0.169	↓ -0.086
New England (PADD1A)	3.884	3.895	3.967	↑ 0.072	↓ -0.121
Central Atlantic (PADD1B)	3.761	3.782	3.919	↑ 0.137	↓ -0.129
Lower Atlantic (PADD1C)	3.399	3.532	3.725	↑ 0.193	↓ -0.065
Midwest (PADD2)	3.429	3.537	3.777	↑ 0.240	↑ 0.115
Gulf Coast (PADD3)	3.109	3.212	3.436	↑ 0.224	↓ -0.070
Rocky Mountain (PADD4)	3.481	3.548	3.689	↑ 0.141	↓ -0.021
West Coast (PADD5)	4.217	4.310	4.458	↑ 0.148	↑ 0.038
West Coast less California	3.764	3.902	4.082	↑ 0.180	↑ 0.092
California	4.739	4.781	4.893	↑ 0.112	↓ -0.020

\*prices include all taxes

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

# Crop Updates



Tropical activity continues in the Eastern Pacific as Hurricane Flossie weakens and moves offshore near southern Baja over the next few days. Another system is likely to develop into a tropical depression near southwestern Mexico next week. Meanwhile in the Gulf of Mexico another tropical system is anticipated to form off the gulf coast of Florida over the weekend into early next. Regardless of development these potential systems will bring substantial precipitation to Southern and Central Mexico and the Southeast U.S. into next week.

The Southwestern and Central Mexico regions have already received significant precipitation and hail from numerous previous tropical systems as the rains continue. Growers in the region are not able to get their crews in to harvest on regular schedules due to saturated field conditions. Numerous crops continue to be impacted and with more rain on the way, yields and quality will suffer further lessening supplies from the region.

Regional U.S. production has also been impacted by inclement weather across the country hindering production. Heavy rains and the recent record heat across the Mid-Atlantic, Southeast and Eastern Seaboard have impacted production of the various crops. All of these factors have drastically increased demand for California supplies.

Out West in the coastal California growing regions, the continued heavy marine layer causing extended cooler temperatures has slowed growth rates in the fields. This has also increased mold, mildew and soil disease in the stands. Add to this increased insect pressure, especially diamondback moth intrusions in the Cole crop fields. These small moths can quickly impact broccoli, brussels sprouts, cabbage and cauliflower fields as the larvae feed on the plants. These larvae are quite active and well camouflaged and can easily hide in the broccoli crown (and other Cole crops) making it very difficult for growers and harvest crews to spot the embedded pests. All these factors will contribute to lesser yields and quality of the various crops impacted as growers assess damage.

We will be watching the weather patterns to keep you up to date as to the potential impacts on the various crops and growing regions as reports become available.



**TIM LYNCH**

**QUALITY ASSURANCE MANAGER**