

The Source

Commodity of the Month - Potatoes

MARKET ALERTS

Asparagus: Asparagus supplies remain tight, keeping pricing elevated until Baja production returns in October.

Celery: Supplies are lighter, especially in Salinas, while Oxnard and Santa Maria offer better availability. Quality remains strong, with higher pricing expected on value-added items.

Citrus (Lemons): Lemon supplies remain tight with strong demand, keeping prices firm as domestic and offshore fruit fill the market.

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

Onions: Onions remain firm as lower yields and freight costs keep pricing elevated. Supplies will transition to Pacific Northwest onions later in the season, with Washington storage onions available.

Pineapple: Pineapple supplies remain steady, with larger sizes improving but crownless and organic availability tight. Volume is expected to decline, tightening supplies into mid-October.

Potatoes: Potato supplies are tightening, especially on larger sizes, due to lower yields and storage issues. Lead time is recommended, with colored and sweet potato supplies also remaining limited.

JULY 22, 2026

CROP UPDATES

Summer heat is driving strong lettuce and leaf supplies, though quality challenges from burn, mildew, and insect pressure require careful handling. Lettuce markets remain favorable, while berries are mixed — strawberries and blueberries have good availability, raspberries are softening, and blackberries remain tight with elevated pricing. Proper cold chain management remains key as warmer weather impacts quality and shelf life.

[Read more](#)

WEATHER

California: Tropical Storm Elida brings brief cooling before warmer-than-average temperatures return through the weekend.

Mexico: Light isolated showers are expected, with warm temperatures continuing through July 26.

Florida: Tropical Storm Bertha moves west toward the Gulf, bringing storms to the Florida Panhandle and continued heat with scattered showers across Florida.

Arizona: Drier conditions will bring extreme heat, with highs reaching the 110s by Friday and gusty winds continuing.

FREIGHT

Freight this week is steady. Finally. Expect this pattern of trucks versus load ratio to remain for the remainder of the summer. We still encourage advanced bookings and proactive efforts in the meantime.

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LOGISTICS

IN PEAK SEASON

- Blueberries
- Carrots
- Citrus (Oranges)
- Grapes
- Stone Fruit
- Strawberries

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Commodity Updates



Apples

The apple market is expected to remain steady through the rest of the month. Gold Delicious supplies continue to tighten, with Red Delicious inventories also declining, supporting gradual price increases. Gala and Granny Smith remain well supplied, keeping the market stable, while lighter Fuji and Pink Lady volumes are expected to hold steady on price.

Commodity/Region Supply Price Quality

Yakima, Washington (August - July)	Light	\$\$\$	Good
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Asparagus

ALERT

The asparagus market remains extremely tight, driven by limited Baja supply, declining Central Mexico quality, and below-average Peruvian production. California FOB prices are expected to stay elevated as Central Mexico winds down in the coming weeks, creating a supply gap until Baja production returns in October. Strong global demand and reduced harvests are expected to keep supplies limited and market pressure high through the Thanksgiving season.

Commodity/Region Supply Price Quality

Caborca (Year Round)	Light	\$\$\$	Fair
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Peru (Year Round)	Light	\$\$\$	Good
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Ohio/NC/MI/NJ (June - September)	Light	\$\$\$	Good
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Mexico (Ciudad Obregon) (Year Round)	Light	\$\$\$	Good
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Avocados

The avocado market is beginning to stabilize as pricing eases from recent highs. Increased Flora Loca harvests are expected to provide additional relief in the coming weeks. The remaining Negra crop is eating well with high oil content but is ripening quickly, while early Flora Loca fruit is maturing more slowly. California production is underway, with Peru expected to continue increasing shipments in the coming weeks.

Commodity/Region Supply Price Quality

Mexico (Year Round)	Steady	\$\$\$	Good
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California (April - July)	Light	\$\$\$	Good
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Bell Peppers

The market is easing as California, the Carolinas, and New Jersey maintain strong production, with FOB prices expected to trend lower. While heat in the East could impact supply and quality into early August, production from the Midwest and Northeast should help fill any gaps.

Commodity/Region Supply Price Quality

California (May - October)	Steady	\$\$\$	Good
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Ohio/NC/MI/NJ (June - September)	Steady	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Berries (Blackberries)

Supplies are expected to gradually improve over the next several weeks as production increases in the Pacific Northwest and Central Mexico.

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

Supplies remain adequate, supported by production from Oregon, Washington, Michigan, and Central California.

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

Supplies are improving as Baja production increases and California volumes gradually build. As availability expands, the market is expected to continue easing.

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

Warmer temperatures in California have impacted fruit quality, resulting in softer, more mature fruit that is increasingly susceptible to bruising and decay. Light oversupply and weak demand continue to keep the market soft.

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 very good this week with good quality. Look for this market to stay steady 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 supplies remain strong with good overall quality. The market is expected to stay steady, with potential for a slight increase heading into next week.

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



Carrots

Bakersfield remains the primary growing region, with strong availability and good sizing 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)	Steady	\$\$\$	Good
Salinas, California (May - October)	Steady	\$\$\$	Good



Celery

ALERT

Supplies are expected to be lighter this week, particularly in the Salinas Valley, while Oxnard and Santa Maria offer better availability and more competitive pricing. Quality remains above average with slight pith reported. The market is more active, with higher pricing expected on value-added items next 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 Ruby grapefruit is available, peaking at 48 count, with supplies 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 supplies and strong demand, keeping pricing firm in the near term. Offshore product is arriving on both coasts, while District Two (Ventura/Oxnard) is in full production and supplying the majority of fruit.

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



Citrus (Limes)

Lime crossings remain steady, with supply expected to hold over the next three weeks before tightening. Weather continues to impact U.S. No. 1 yields, while declining Mexican production will be supplemented by Colombian imports. Peru's new season is expected to begin in September/October.

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

ALERT

California Valencia oranges are heavily weighted toward larger sizes, with production peaking on 56ct and 72ct fruit. Smaller sizes, especially 113ct and 138ct, remain extremely limited and are expected to stay tight through the season. Flexibility on sizing will be important, as larger fruit substitutions may be needed to maintain coverage.

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

Markets remain mostly steady, with increasing Baja supplies expected to support promotional opportunities through the summer. Regional production in the East and Midwest continues to improve, though weather-related quality concerns remain in New Jersey.

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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Commodity Updates



Eggplant

East Coast production is increasing, with promotable supplies expected in the coming weeks despite a slower-than-normal start in New Jersey. California supplies remain lighter than usual, keeping prices above seasonal averages despite a softer market.

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



Garlic

Shipments have transitioned to Mexican peeled garlic as of June 22, 2026, and will continue until the new California crop becomes available in late July to early August.

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 good 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 the market 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

Excellent availability and strong quality are expected to continue throughout the week. The market remains flat, with strong production from both northern and southern regions. Weights are averaging 40-44 pounds with good color and texture, and slight misshapen heads are being reported minimally. Shippers are offering aggressively, making this a good opportunity for promotions.

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

This market is flat. Supplies are excellent on romaine as well as green and red leaf. Romaine hearts are abundant as well. Shippers are flexing so promote as much as possible. The overall quality is above average with good weights, sizing and texture. Minimal tip and fringe burn is being reported. Production is very good in both northern and southern CA.

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

Spinach, arugula, and spring mix supplies remain strong, with good quality and sufficient availability to support normal demand.

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, Arizona (November - May)	Steady	\$\$\$	Good
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Melon (Cantaloupe)

Domestic cantaloupe supplies are strong as production transitions into the Westside region of Central California. Fruit is peaking on 9-count with good availability and promotional opportunities on the new crop.

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)

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 pullback. Supplies are available from California, the Southeast, and Texas, supporting a stable market.

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 season. Lower yields are keeping pricing elevated, with freight also impacting the market. Pricing is expected to remain firm until new Pacific Northwest supplies become available. Winter storage onions 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

California Bartlett pear production is running 2-3 weeks ahead of normal this season. While some Delta shippers have completed harvest, they still have several weeks of shipping remaining, which should bridge the transition to Washington's Bartlett crop beginning in early August. No supply gap is expected at this time.

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

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

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Commodity Updates



Pineapples

ALERT

Pineapple supplies remain steady with fair-to-good quality and demand. Markets are steady to slightly higher, with contract business taking priority. Larger sizes are improving, but crownless and organic supplies remain tight. Volume is expected to decline over the next two weeks, tightening supplies through mid-October.

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



Potatoes

ALERT

Large potato sizes are tightening as the season progresses, with lower pack outs and storage issues impacting availability. Lead time will be needed to secure product. Washington potatoes have strong quality, peaking on mid sizes, while larger counts remain tight. Colored potatoes and sweet potatoes also remain limited.

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



Squash

Supplies are strong across New Jersey, New York, and Western North Carolina, with promotable volumes available. Yellow squash remains slightly tighter due to lower yields, while zucchini and gray squash are readily available.

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 peaches and nectarines sizing up and limited small fruit available. Small plums remain a strong value opportunity. Chilean kiwi supplies remain steady and will continue until California production resumes in October.

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

Moisture from Tropical Storm Elida will deepen the marine layer and bring slightly cooler temperatures Wednesday before warmer-than-average conditions return through the weekend. Coastal highs will reach the mid-70s to mid-80s, with inland areas ranging from the mid-80s to triple digits.



MEXICO

Light, isolated showers are expected through the weekend, with most areas receiving less than 0.10" of rainfall. Seasonably warm temperatures will continue through July 26, with highs in the upper 70s to upper 80s and overnight lows in the mid-50s to low 60s.



FLORIDA

Tropical Storm Bertha will continue tracking westward along the coast toward the Gulf of America, with current forecasts showing a potential landfall near Louisiana and possibly Texas as a weakening system by mid to late week. Tropical Storm Warnings remain in effect for parts of the Florida Panhandle, where tropical storm conditions, showers, and thunderstorms are expected. The rest of Florida will see continued heat, humidity, and isolated to scattered showers, with highs in the upper 80s to mid-90s through the end of the week.



ARIZONA

Drier air will reduce rain chances across the low deserts as high pressure strengthens, bringing a warming trend into the weekend. Highs will climb from the low 100s today to the low-upper 110s by Friday, with overnight lows rising into the mid-80s to low 90s. Gusty southerly winds will continue, increasing to 20-22 mph by Friday morning.

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

Freight Updates



Freight this week is steady. Finally. Expect this pattern of trucks versus load ratio to remain for the remainder of the summer. We still encourage advanced bookings and proactive efforts in the meantime.



U.S. On-Highway Diesel Fuel Prices*(dollars per gallon) [full history](#) [XLS](#)

	07/06/26	07/13/26	07/20/26	Change from		
				2 year ago	year ago	week ago
U.S.	4.578	4.796	5.134	↑ 1.355	↑ 1.322	↑ 0.338
East Coast (PADD1)	4.694	4.894	5.194	↑ 1.322	↑ 1.373	↑ 0.300
New England (PADD1A)	5.220	5.189	5.399	↑ 1.298	↑ 1.415	↑ 0.210
Central Atlantic (PADD1B)	5.146	5.204	5.370	↑ 1.309	↑ 1.395	↑ 0.166
Lower Atlantic (PADD1C)	4.477	4.748	5.107	↑ 1.329	↑ 1.360	↑ 0.359
Midwest (PADD2)	4.458	4.659	4.988	↑ 1.256	↑ 1.193	↑ 0.329
Gulf Coast (PADD3)	4.225	4.546	4.942	↑ 1.481	↑ 1.466	↑ 0.396
Rocky Mountain (PADD4)	4.484	4.600	4.935	↑ 1.204	↑ 1.165	↑ 0.335
West Coast (PADD5)	5.425	5.550	5.877	↑ 1.483	↑ 1.335	↑ 0.327
West Coast less California	4.864	5.052	5.362	↑ 1.385	↑ 1.186	↑ 0.310
California	6.073	6.126	6.471	↑ 1.597	↑ 1.508	↑ 0.345

**prices include all taxes*

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

Crop Updates



Lettuce Eat Through the Heat

Summer weather is keeping the Salinas Valley on watch this week. Warm days, higher humidity, and long daylight hours are pushing crops along quickly, which is good for supply but harder on quality. Lettuce and leaf markets are sitting near seasonal lows, and with heat across much of the country, this is still a great time to keep fresh salads moving.

Iceberg, romaine, and green leaf supplies remain available, but crews are working harder in the field to keep packs clean. The recent weather is bringing on more burn, mildew, seeder, and insect pressure in certain lots. Packers can trim around some of these issues, but deeper defects in iceberg and romaine are harder to catch before shipping. Weights and yields can vary as harvest crews trim more aggressively. Cold-chain management and quicker turns will make a big difference in keeping quality strong.

Berries are in a softer stretch overall, with the exception of blackberries. Strawberry demand is light as retail focus shifts toward California stone fruit and foodservice stays quiet ahead of school business returning in mid-August. Salinas and Watsonville quality has been fair, with warm nights keeping fruit from resting properly. That is leading to smaller, riper berries and more bruising. Santa Maria production is improving and should continue building over the next several weeks. Markets remain flat, with some volume pricing available to help keep fruit moving.



Crop Updates



Blueberries continue to have good supply out of Oregon and Washington, with Michigan expected to increase over the next few weeks. New Jersey is still producing light volume and working through quality challenges. Markets are steady overall, with enough fruit available to keep pressure on pricing.

Blackberries are still the outlier. Supply remains limited, but there is some light at the end of the tunnel as a few Central Mexico programs begin to improve. More relief should show up in early August as Mexico, Oregon, and California's Central Coast add volume. Until then, demand is still running ahead of supply and markets remain elevated.

Raspberries are moving in the other direction as more fruit becomes available from Baja and Central Mexico. Volumes are improving for most suppliers, and markets are softening as supply gets ahead of current demand.

Overall, this is a good week to lean into lettuce and leaf while keeping berry inventories moving. Markets are favorable on salads, but summer weather means shelf life and cold chain still matter. Strawberries and blueberries have volume, raspberries are easing, and blackberries remain the berry item with the least flexibility.

