

The Source

Commodity of the Month - Potatoes

MARKET ALERTS

Bell Peppers: The market is tight with low supply and high demand. Red bells are especially limited as California transitions north and Mexico crossings stay light. Canada has moderate production, with some imports from Holland.

Brussel Sprouts: Sprout supplies remain light with high prices as demand outpaces supply. Oxnard is nearly finished, and quality issues persist.

JULY 9, 2025

CROP UPDATES

Tropical activity is calm. Heavy rains in the Mid-Atlantic, Southeast, and Central Mexico affect supplies and boost demand for California produce. Cooler, damp conditions in Coastal California slow growth, keeping supplies light but quality good. [Read more](#)

WEATHER

California: Temps will rise this week with above-average warmth. Coastal highs will be in the low 60s to 70s, while inland areas reach the 80s to low 100s, especially south of Soledad. Temps peak Thursday, then cool slightly—by up to 5 degrees—into the weekend.

Florida: Warm, humid conditions continue across Florida through the weekend, with scattered showers and storms. Rainfall will range from 0.05"–0.30", locally higher. Highs stay in the upper 80s to mid-90s, with gusts under 20 mph through Friday.

Mexico: Scattered showers and storms are expected through July 13th, with 0.10"–0.35" of rain, possibly more in storms. Conditions stay humid with near to slightly below normal temps. Highs will be in the low 70s to low 80s, and lows in the mid 50s to mid 60s.

Arizona: A strong high brings near-record highs Wed–Thurs: 112–117°F in AZ, 115–121°F in southeast CA. Morning lows rise from low 80s to upper 80s. Slight cooling into the weekend, but temps stay above normal.

IN PEAK SEASON



FREIGHT

Freight this week sees the slowest time of year out west. Along the Mexican border, rain markets due to monsoon and hurricane activity, creating slow crossings, are apparent. Regional growing deals supplying product from smaller farms across the nation are about the only real active market in trucking this week.

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Commodity Updates



Apples

The apple market remains steady overall. Although no varieties have fully finished, several—including Golds, Pinks, Honeys, and Cosmics—are tapering off with select shippers and showing reduced availability. Even so, pricing has remained largely firm. The new crop is set to begin arriving in August, with Ginger Golds and Galas expected by mid-month, followed by Honeycrisp toward the end of August.

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



Asparagus

Asparagus supplies remain strong on both coasts, with production out of Peru and Mexico showing significant improvement. Expect the market to stay on the lower side through the remainder of the week.

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



Avocados

Markets on 48ct have shown slight improvement, while 60ct and 70ct sizes have strengthened as we approach the end of the Normal crop. Recent rains have contributed to increased sizing. About one week remains for the current Normal crop, with Flora Loca up next. Right now, the peak appears to be on 48/60ct, and while nothing is certain, sizing could remain in this range as the new harvest begins. The California season is beginning to slow down, and offshore fruit is now arriving on both coasts.

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



Bell Peppers

ALERT

The market is tight with low supply and strong demand; Coachella and South Georgia seasons have ended. Red bell peppers are particularly limited as California transitions to northern growing areas, while Mexican crossings remain light. Moderate production continues in Canada, supplemented by some imports from Holland.

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

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

Supply Partners



Commodity Updates



Berries (Blackberries)

West Coast production is set to increase with warmer weather expected in late July. Mexican transfer fruit is declining due to weather, and California quality is projected to be much stronger than current Mexican supplies.

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

The Pacific Northwest season is underway with product coming out of Oregon, Washington, and British Columbia. New Jersey continues to produce solid volumes. Michigan began harvesting last week, though heat and rain are limiting production.

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

Strong volumes are coming out of Central Mexico, Baja, and California's Central Coast, with some volume deals currently being offered.

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

Salinas and Watsonville are past peak harvest and entering a slow, steady decline in production. Santa Maria and Oxnard will begin harvesting late spring plantings in 2-3 weeks, helping to offset the drop in volume from the northern districts.

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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Driscoll's
Only the Finest Berries™



Commodity Updates



Broccoli

Broccoli supplies remain tight across all regions, with increased demand driven by erratic weather in Mexico. Expect the market to gradually rise heading into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair
Santa Maria, California (Year Round)	Light	\$\$\$	Good



Brussel Sprouts

ALERT

Sprout supplies are expected to remain light with high prices, as demand exceeds availability. Oxnard production is slowing and nearing completion. Quality issues persist, including elongated cores and stems, light insect damage, and some internal discoloration.

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



Carrots

Harvest in the Bakersfield region is progressing well and will continue through the end of July. The summer season will then shift to the Cuyama/Lancaster area, running through November. Current quality and sizing remain solid. The jumbo market has tightened slightly as other regions finish. 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

Moderate supplies combined with strong demand are keeping the cauliflower market elevated. Expect this trend to continue into next week.

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



Celery

Overall, the market remains steady and is expected to continue this week. Santa Maria/Oxnard remains the primary growing region, with improved production coming from Salinas. Both regions continue to deliver good quality, with large sizes most readily available.

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 from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

Markets are strengthening as District 1 finishes and District 2 becomes the main growing region. Sizes 165ct and smaller are limited. Choice grade dominates, with less Fancy due to growing conditions. Offshore fruit is delayed until late July/early August; Mexico will ramp up mid-July.

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)

Markets are steady to slightly down, with good availability from Mexico and offshore sources. Quality is fair, though oil spotting and styler issues require additional grading. Rain in Mexico is favoring larger sizes, making smaller fruit increasingly scarce.

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



Citrus (Oranges)

Valencias are the main variety, currently peaking on 113ct/138ct as the season begins, with sizes expected to grow. Gas times of about 48 hours are used to enhance color. Brix levels are 12-13, and the fruit is eating very well.

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



Cucumber

North Carolina supply is light due to bad weather, while Michigan, Ohio, and New York are ramping up soon. Mainland Mexico is finished, with Baja becoming the main summer source.

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

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

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Commodity Updates



Eggplant

Eastern supply remains light but steady as Georgia wraps up and North Carolina stays active. Western supply is strong, led by Fresno following the California desert season. Washington's harvest begins in August, boosting national availability.

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



Garlic

Garlic quality from Mexico remains fair, with moderate yields expected through 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 shippers have largely recovered from the early June storm, with improved quality and significantly lower prices due to increased volume and California's Central Valley season starting soon. California harvest ramps up this week with Flames and Ivories; initial prices will be higher but are expected to drop next week as volume grows.

Grapes (Green)

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

Grapes (Red)

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



Green Onions

Supplies remain slightly tight, with the market gradually rising. Expect prices to continue climbing into the weekend.

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



Kale

Very good supplies are keeping the kale market steady, with quality remaining strong. Expect the market 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

Expect light availability and rising prices throughout the week. Due to low production in Mexico, processors are buying large acreages in Salinas and Southern California. Higher prices will continue on value-added items and contracted business at least through the week. Reports include light weights, puffy heads, and misshapen heads, with average weights around 33-36 pounds from most suppliers.

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



Lettuce Leaf

Green and red leaf, along with romaine, will have moderate to light availability all week, with romaine hearts remaining limited. Though less severe than lettuce, supplies are still tight. Small sizing, lighter weights, and some fringe and tip burn have been reported. Contracted romaine heart prices will continue to rise throughout the week.

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



Lettuce Tender Leaf

Supplies of all tender leaf items are expected to be plentiful this week. The market is forecasted to remain steady into next week.

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



Melon (Cantaloupe)

The cantaloupe market remains strong post-holiday. Heavy rains in key growing areas have pushed demand in the West. Warm weather is producing high-quality cantaloupes, peaking on size 9 with Brix levels between 13-16. Smaller sizes (12/15) are scarce due to the heat wave.

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

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

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Commodity Updates



Melon (Honeydew)

The honeydew market is strong post-holiday. Warm weather is producing high-quality melons, peaking on size 5 with Brix levels of 13-16. Suppliers are primarily sourcing from Central California. Nogales melons remain very limited in availability.

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



Melon (Watermelon)

Domestic watermelons are available in Florida and Central California, while Mexican supplies are nearly finished. Post-holiday demand is light, leading to aggressive pricing and volume deals.

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



Mushroom

Excellent supplies and promotable volumes remain available.

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



Onions

Onions are currently shipping from California and New Mexico. In California, harvest has transitioned from the desert to Central CA. New Mexico is offering a mix of U.S. and Mexican crop, though quality concerns persist due to ongoing heavy rains and flooding. Demand remains strong, with both domestic and Mexican supply keeping the market active.

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



Pears

The Washington pear market remains stable, though some shippers are nearing the end of their season. California Bartletts are set to begin later this week, with a strong crop and expected good quality. California Bosc and Red Pears are scheduled to start in the last week of July.

Commodity/Region	Supply	Price	Quality
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 improving with new fields coming online in Costa Rica. Large crownless varieties remain in high demand.

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

The Idaho market is tight on 40-70 count through August, with Burbanks available all summer. Pricing in Idaho and Colorado is expected to rise short term, driven by DLVD rates. New plantings are in the ground in Eastern Idaho, with harvest set for mid-August. Demand is stronger for red potatoes, while yellow varieties 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

Georgia and Mexico seasons are ending, with limited supply from Baja. North Carolina volumes remain very low due to heat and rain damage. New Jersey and other Eastern states are increasing supply, easing market pressure.

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



Stone Fruit

Peaches, plums, and nectarines are in good supply with a steady market. Specialty items like donut peaches and pluots are also available. Imported kiwis remain steady at elevated prices, expected to hold until California's season starts in October. Washington cherries are peaking this month, offering strong promotional opportunities.

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

Eastern volumes slowly improving post-weather; still tight. TN starting this week. Western supply steady fairly steady CA and Baja. Grape tomatoes are very tight; market should stabilize soon.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Steady	\$\$\$	Good
Florida (November - May)	Steady	\$\$\$	Good

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

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Weather Updates



CALIFORNIA

Temperatures continue to rise this week as high pressure strengthens, bringing above-average warmth. Morning lows will range from the mid-40s to mid-50s, with daytime highs near the coast in the low 60s to low 70s. Inland, coastal valley highs on Wednesday will reach the low to upper 80s, with temperatures hitting the low 90s to 100 south of Soledad. Max temps peak Thursday, reaching mid-80s to low 90s in the coastal valleys and upper 90s to 103 south of Soledad. Although the high pressure weakens Friday, temperatures will only drop by up to 5 degrees area-wide through the weekend.



MEXICO

Scattered showers and thunderstorms are expected across the region through July 13th. Rainfall totals will generally range from 0.10" to 0.35," with higher amounts possible in thunderstorms. Conditions will be a bit more humid, with temperatures near to slightly below normal. Highs will range from the low 70s to low 80s through Sunday, with lows in the mid 50s to mid 60s each morning.



FLORIDA

Warm temperatures and humid conditions will continue through the weekend across the Florida peninsula, with isolated to scattered showers and thunderstorms. Rainfall totals are expected to range from 0.05" to 0.30" in most showers, with higher amounts possible in some storms. Highs will be in the upper 80s to mid-90s through Sunday. Winds will gust near or below 20 mph through Friday.



ARIZONA

A strong high-pressure system will bring near-record highs Wednesday and Thursday, with maximum temperatures reaching 112-117°F in central and southwest Arizona and 115-121°F in southeast California valleys. Morning lows will warm to the low-mid 80s Wednesday, rising to upper 80s by Thursday morning. Temperatures will cool slightly into the weekend but remain above normal for the next five days.

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

Freight Updates



Freight this week sees the slowest time of year out west. Along the Mexican border, rain markets due to monsoon and hurricane activity, creating slow crossings, are apparent. Regional growing deals supplying product from smaller farms across the nation are about the only real active market in trucking this week.



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

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

	06/23/25	06/30/25	07/07/25	Change from	
				week ago	year ago
U.S.	3.775	3.727	3.739	↑ 0.012	↓ -0.126
East Coast (PADD1)	3.790	3.775	3.765	↓ -0.010	↓ -0.169
New England (PADD1A)	3.967	3.980	3.967	↓ -0.013	↓ -0.134
Central Atlantic (PADD1B)	3.919	3.942	3.936	↓ -0.006	↓ -0.151
Lower Atlantic (PADD1C)	3.725	3.691	3.680	↓ -0.011	↓ -0.181
Midwest (PADD2)	3.777	3.715	3.733	↑ 0.018	↓ -0.070
Gulf Coast (PADD3)	3.436	3.369	3.383	↑ 0.014	↓ -0.215
Rocky Mountain (PADD4)	3.689	3.659	3.666	↑ 0.007	↓ -0.124
West Coast (PADD5)	4.458	4.421	4.462	↑ 0.041	↑ 0.008
West Coast less California	4.082	4.035	4.088	↑ 0.053	↑ 0.070
California	4.893	4.866	4.892	↑ 0.026	↓ -0.063

*prices include all taxes

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

Crop Updates



Tropical activity has calmed in both the Atlantic and Pacific basin with no potential formation expected this week. Tropical Depression Chantal brought heavy precipitation across the Mid-Atlantic and Southeast. Current forecasts continue to bring heavy precipitation to this region throughout the week. This will once again impact the various local/regional supplies across the region.

Central and West-Central Mexico is forecast to continue to receive significant precipitation through the week with long-range outlooks keeping the rains in the region into late July.

The Southeastern and Central Mexico regions have already received significant precipitation from numerous previous tropical systems as the rains continue. These regions contribute significant supplies during the summer and fall. All of these factors have drastically increased demand for California supplies. Regional processors who typically rely on production from Mexico are looking to California for supplies further reducing overall volume.

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 as insect pressure remains problematic. Growers are entering leaf and lettuce fields ahead of schedule to meet the increased demand. These younger stands are producing lighter weights and head density, with generally good quality. Supplies look to remain light for the near term at a minimum as summer harvests continue.

Growers across the various regions are hoping for an improved weather pattern to help fields recover and increase production. 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