

# The Source

## Commodity of the Month - Onions

### MARKET ALERTS

**Strawberries:** Cool temps and cloud cover are slowing production in Santa Maria and Salinas/Watsonville. Many shippers are sold out, with late orders pushed to Monday. Smaller berry sizing is also cutting yields.

**Broccoli:** Broccoli supplies are tight as Diamondback moths damage Salinas Valley crops. Some fields are lost, and the market is expected to rise into next week.

**Citrus (Lemons):** Markets remain strong, with 165ct and smaller sizes tighter. District 2 (Oxnard) is now the main region as District 1 is done. Offshore is delayed 3 weeks, and Mexico starts mid-July. Domestic supplies are tight, with heavy pressure on District 2's mostly choice-grade crop.

**Cauliflower:** Supplies are tightening as storms in Mexico boost demand on Salinas and Santa Maria. Market prices are expected to rise into next week.

**Blackberries:** Quality issues in Central Mexico are affecting arrivals. California's delayed season starts next week with low initial volumes. Georgia remains a reliable East Coast option.

**Brussel Sprouts:** Supplies are tight due to weather and Hurricane Erick in Mexico. Demand is shifting to limited Oxnard supplies, with Salinas not starting until late July.

**Lettuce (iceberg):** The market has surged due to weather-related shortages in Mexico, the Midwest, and East Coast. Salinas and Southern CA can't meet demand. Value-added prices may rise, with carton weights averaging 35–40 lbs.

**Lettuce Leaf:** Demand is up for romaine and leaf lettuce. Romaine hearts are tight with rising contract prices. Supplies are light to moderate, with some quality issues due to weather.

**Lettuce Tender Leaf:** Tender leaf supplies like cilantro, spinach, and arugula are tight due to weather-related yellowing. Limited supply expected into next week.

## JUNE 25, 2025

### CROP UPDATES

A new tropical system is expected off Southern Mexico, adding to recent storm damage and harvest delays. Extreme heat in the U.S. is stressing crops. With reduced Mexico and eastern production, California supply shortages — especially in lettuce and romaine — are rising. Weather remains critical to crop quality and availability [Read more](#)

### WEATHER

**California:** High pressure builds Wednesday, bringing near to above-average temps through the weekend. Morning lows range from low 40s to mid 50s; daytime highs reach low 60s to low 70s near the coast, upper 70s to mid 80s in coastal valleys, and upper 80s to mid 90s south of Soledad.

**Mexico:** Isolated to scattered showers and storms expected through Sunday, with rainfall mostly 0.10"–0.35", and up to 0.50"+ in some storms. Temps will be slightly below normal, warming late week.

**Florida:** Warm temps continue through the week, then cool slightly with more humidity and showers over the weekend. Showers isolated to scattered Thursday, becoming more widespread Friday–Sunday.

**Arizona:** Low desert valleys will slowly warm into the weekend under high pressure. Arizona highs rise from upper 90s–102°F Tuesday to 104–109°F Saturday. Imperial and Coachella Valleys warm from upper 90s–105°F Tuesday to 108–113°F Friday. Morning lows increase from mid-60s Tuesday to mid-70s Friday.

### IN PEAK SEASON



### FREIGHT

Pre-holiday markets show signs of slowing into 4<sup>th</sup> of July, yet stays steady into this week. We anticipate slower markets in the coming weeks, and with the downturn in demand, be reminded that Pro\*Fresh hosts an array of cross docking and LTL services from the main US growing regions. Ask your representative for info on this exciting freight solution.

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# Commodity Updates



## Apples

The apple market is expected to remain stable through the rest of June and into July. Some varieties are in shorter supply than others, with Honeycrisp, Cosmic Crisp, and to a lesser extent, Golden Delicious and Pink Lady, experiencing tighter availability. Currently, no gaps are anticipated between the old crop and the new.

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



## Asparagus

Asparagus supplies out of Mexico continue to improve, while Peruvian supplies remain steady. Domestic production in Michigan is beginning to wind down this week, contributing to a slight upward trend in the market. Overall, expect steady conditions on both coasts throughout 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 remain steady across the board. Larger fruit continues to command a premium over 48ct and smaller sizes. There are roughly two weeks left of the current Normal crop, with Flora Loca set to follow. The current size peak is on 60/70ct, but with the rainy season underway, sizing is expected to increase. While nothing is confirmed yet, peak sizing may shift into the 48/60ct range by the time harvest begins. Meanwhile, the California season is beginning to slow, and offshore fruit is now arriving on both coasts.

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



## Bell Peppers

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**

Quality issues continue to impact transferred fruit out of Central Mexico, affecting arrivals. The California season is running late due to cold weather and persistent cloud cover, with production expected to begin next week. Initial volumes will be limited, gradually increasing as we move into early July. Georgia product remains a reliable loading option for the East Coast.

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



## Berries (Blueberries)

Pacific Northwest production is now underway, and improved volumes are beginning to reach California distribution points. Georgia's season is nearly complete, while New Jersey has been in active production for the past two weeks. Overall, markets remain steady.

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



## Berries (Raspberries)

Baja production remains steady as we await the California season to begin in mid-July.

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



## Berries (Strawberries)

**ALERT**

Heavy cloud cover and cooler temperatures are slowing production in both Santa Maria and the Salinas/Watsonville areas. Many shippers report being sold out for the week, with some pushing late orders into Monday loading. Additionally, smaller berry sizing in both regions is further reducing overall yields.

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

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

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**Driscoll's**  
Only the Finest Berries™



# Commodity Updates



## Broccoli

**ALERT**

Broccoli supplies have tightened this week as the Diamondback moth population thrives in the Salinas Valley. Numerous hot spots are being reported, with green larvae damaging the broccoli crowns. Some fields have been completely lost to this pest, reducing overall supply. Expect the market to continue climbing into next week.

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



## Brussel Sprouts

**ALERT**

Brussels sprout supplies are tightening due to erratic weather and Hurricane Erick in Mexico, causing quality and yield issues. Demand is shifting to already limited Oxnard supplies. Salinas production won't start until late July.

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



## Carrots

Harvest has resumed in the Bakersfield region, following the end of the season in the Desert Imperial Valley. Sizing remains strong across the board. A reminder to submit snack pack orders at least 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

**ALERT**

Cauliflower supplies are tightening this week as thunderstorms in Mexico increase demand on Salinas and Santa Maria. Expect the market to rise into next week.

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



## Celery

The market remains steady as production ramps up in Salinas, with Santa Maria and Oxnard continuing to offer moderate to good supplies throughout the week. Large sizes have the strongest availability, though all sizes are accessible to meet demand. Slight seeder has been noted upon arrival, but overall quality remains solid in both regions.

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 currently available, peaking at 40ct and larger sizes, and are shipping out of both Riverside and the San Joaquin Valley.

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



## Citrus (Lemons)



Markets remain strong, with 165ct and smaller sizes slightly tighter. District 1 (San Joaquin Valley) has finished, and District 2 (Ventura County/Oxnard) is now the primary growing region. Offshore arrivals are delayed by about three weeks, while Mexico is projected to start mid-July. As a result, domestic supplies have tightened rapidly, putting significant pressure on California's District 2 crop, which typically yields more choice-grade fruit.

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



## Citrus (Limes)

The market is slightly active as rain in Mexico has delayed harvest. However, existing pipeline supply is helping keep prices relatively steady. The rainfall is expected to improve sizing on upcoming Mexican product.

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



## Citrus (Oranges)

The Navel season is nearly complete, with Valencias now taking over as the primary variety. A few Navel stragglers remain, but this is likely the final week for shipping them. Valencias are currently peaking on 113ct/138ct as the season begins and are expected to size up as it progresses. Gas times are running 24-48 hours to enhance color, and brix levels are ranging from 11 to 13, with the fruit eating exceptionally well.

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



## Cucumber

Eastern U.S. cucumber supply is light but should improve soon as Georgia wraps up and Virginia and Michigan begin harvesting. West Coast supply from Baja and Mexico remains steady. Quality out of Baja is good, though slightly lighter with the new crop starting. Volume from Michoacán is helping balance supply but may remain light until Eastern regions ramp up.

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

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 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)

The Mexican grape market is adjusting downward as supplies stabilize and Nogales shippers begin to feel pressure from the upcoming Bakersfield start in early July. Coachella prices remain steady for now but are expected to respond to the new Bakersfield crop soon.

### Grapes (Green)

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

### Grapes (Red)

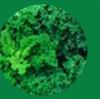
Commodity/Region	Supply	Price	Quality
Mexico (May - June)	Steady	\$\$\$	Good



## Green Onions

Green onion supplies and quality remain strong, with the market expected to stay steady through next week.

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



## Kale

Kale supplies are mostly steady with good quality. Expect the market to remain stable 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 has surged across the industry. Adverse weather in the Midwest and East Coast, along with heavy rains in Mexico, have created a significant shortage. Salinas and Southern California cannot keep up with demand. Value-added items are expected to see price increases by week's end. Carton weights will average 35-40 pounds from multiple shippers.

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

**ALERT**

Demand has increased for romaine, green leaf, and red leaf. Romaine hearts are tight and contract prices have escalated, with this trend expected to continue through the week. Supplies are light to moderate due to erratic weather in Mexico, the Midwest, and the East Coast. Fringe and tip burn have been observed on arrivals.

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

**ALERT**

Tender leaf supplies—including cilantro, spinach, and arugula—have tightened this week due to yellowing caused by erratic weather. Expect limited supplies to continue into next week.

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

The cantaloupe market remains strong due to retail promotions and contracts. Supply will be limited until the transition to Central California. Growing regions are experiencing daytime temperatures above 110°F. Product is peaking on size 9, with Brix levels between 13 and 16.

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 thanks to retail promotions and contracts. Mexican honeydews remain available for another week or two, while domestic honeydews are peaking on larger sizes. Growing regions continue to see daytime temperatures above 110°F.

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 Florida and Arizona, with a transition to Central California expected within one to two weeks. Supply is available, and suppliers are actively seeking deals ahead of the upcoming holiday.

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 available in California and New Mexico. The desert season in California has ended, with supplies now coming from Central California. Recent rain in New Mexico is prompting growers to assess its impact. Texas and Georgia onion seasons are wrapping up, while Mexico will continue production for several more weeks.

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



## Pears

The domestic pear market is stable to slightly lower, despite limited supply. Expect little change until mid-July, when California's new Bartlett crop becomes available.

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 looking good and readily available. Large crownless pineapples remain in high demand.

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



## Potatoes

Pricing on 40-50ct potatoes has risen due to limited storage supply. Burbank variety will be available through summer. FOB prices are stable, with delivered pricing currently driving the market. New plantings in Eastern Idaho are underway, with harvest expected by mid-August. Demand for red potatoes is down, while yellow potato demand remains steady.

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



## Squash

Markets are active with slightly lighter supply across both East and West. California is between new fields, resulting in tighter availability. East Coast local deals are expected soon, which should help ease the market.

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



## Stone Fruit

Peaches, plums, and nectarines are plentiful, with donut peaches now available. Washington cherries are sizing well, peaking in the 10-10.5 row range, offering strong volume and attractive pricing. Expect the market to heat up as Fourth of July promotions begin later this week.

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



## Tomatoes

Crops are transitioning on both coasts, but markets remain steady. The East is focused in South Carolina, with Tennessee starting around July 4th. California production has begun, with seasonal volumes expected by early July. Fruit is coming from Baja and Nogales, though western Mexico is winding down with some quality concerns. The industry is on alert as the Tomato Suspension Agreement ends July 14th.

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

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

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# Weather Updates



## CALIFORNIA

High pressure strengthens Wednesday, bringing near to above-average temperatures through the weekend. Morning lows will range from the low 40s to mid-50s, with daytime highs in the low 60s to low 70s near the coast, upper 70s to mid-80s in the coastal valleys, and upper 80s to mid-90s south of Soledad.



## MEXICO

Expect isolated to scattered showers and thunderstorms through Thursday, with additional isolated showers and storms from Friday through Sunday. Rainfall totals will generally range from 0.10” to 0.35”, though some thunderstorms—especially on Thursday—could bring 0.50” or more. Temperatures will average a few degrees below normal over the next five days, warming slightly toward the end of the week.



## FLORIDA

Warm temperatures will persist through the end of the week, then cool slightly over the weekend amid increased humidity and shower activity. Showers will be isolated to scattered through Thursday, becoming more widespread from Friday through Sunday as an upper-level disturbance passes and moisture levels rise in the region.



## ARIZONA

The low desert valleys will experience gradual warming into the weekend under stationary high pressure and light southerly winds. Arizona highs are expected to range from the upper 90s to 102°F on Tuesday, rising to 104–109°F by Saturday afternoon. Imperial and Coachella Valleys will see highs in the upper 90s to 105°F on Tuesday, warming to 108–113°F by Friday. Morning lows will increase from the mid to upper 60s on Tuesday to the mid 70s by Friday.

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

# Freight Updates



Pre-holiday markets show signs of slowing into 4<sup>th</sup> of July, yet stays steady into this week. We anticipate slower markets in the coming weeks, and with the downturn in demand, be reminded that Pro\*Fresh hosts an array of cross docking and LTL services from the main US growing regions. Ask your representative for info on this exciting freight solution.



## 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 following hurricane Erick last week as another tropical system is expected to form off the coast of Southern Mexico later this week. NOAA reports “Environmental conditions are conducive for gradual development and a tropical depression is likely to form over the weekend”. These regions have already received significant precipitation and hail from previous tropical systems with extensive damage reported in some iceberg, romaine and broccoli fields. Numerous crops are likely to be impacted and with more heavy rain on the way, yields and quality will suffer. Growers are having a problem getting equipment into the saturated fields for harvesting activities severely impacting production for the near term. It will take some time for growers to conduct crop assessments following these storms.

Regional production is gaining momentum across the country; however very hot temperatures are forecast as a very strong upper ridge remains centered over the middle half of the country. Extensive extreme heat warnings and/or heat advisories remain in affect from the entire East Coast to Georgia as well as along the Mississippi Valley.

With the anticipated lighter production from Mexico and the heat impacting local production out east demand for California supplies is on the rise causing some product shortages especially in the lettuce and romaine supplies.

At this point Mother Nature is in charge with upcoming weather patterns crucial to overall supplies and quality from the various growing regions. 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**