

The Source

Commodity of the Month - Potatoes



MARKET ALERTS

Asparagus - Mexican asparagus has improved this week due to better weather, and Peruvian volume is expected to continue increasing. Jumbo sizing remains limited, but the market on both coasts is set to stabilize.

Avocado - Ripening times for the Normal crop remain short until the next crop is ready. Flora Loca has started in light quantities, with lower maturity levels. California production continues through August, while Colombian fruit is arriving with decreasing volumes, and Peru's supply will last through late August.

Blackberries - Extreme heat in Central Mexico and California has slowed plant recovery, while recent rain in Mexico is causing quality issues and reducing volume. Consequently, demand is currently exceeding supply.

Onions - High temperatures in California are causing production delays, leading to elevated prices in New Mexico due to shortages.

Potatoes - With Norkotahs ending and Burbanks now the primary variety, stocks of 40-70 CT are limited, while there are abundant supplies of 80-120 CT and 6 oz #2s.

JULY 17, 2024

CROP UPDATES

Growers in the U.S. face challenges from heat waves, strong winds, and thunderstorms, with record high temperatures not expected in the East and potential record high minimums in the Mid-Atlantic and Northeast, potentially impacting yields and quality during harvests. [Read more](#)

WEATHER

Arizona - Temperatures in Yuma and southeast California will remain 105-110, with potential for isolated showers by Friday. Light-moderate southerly winds will weaken towards the weekend.

California - Island temperatures will return to heat wave levels this weekend, but coast and coastal valley field temperatures will remain slightly above average due to lack of offshore flow. Daytime highs near the coast will range from the upper 50s to low 70s.

Florida - A cold front is expected to push southeast, stall over terrain west, and weaker synoptic flow may allow air mass t-storms and sea breeze showers/t-storms.

Mexico - Over the next five days, showers will be isolated to scattered, causing rainfall between 0.05" and 0.30", with temperatures below average by the end of the week.

FREIGHT

Freight rates this week ease from California post-holiday, as expected. Great time to reach out to see what Pro*Fresh can do for your FTL and LTL requests.



IN PEAK SEASON



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Commodity Updates



Apples

As we enter the third week of July, new crop Washington apples are just around the corner. While most varieties won't start until September, new crop Gala and Honey Crisp apples will begin in the second week of August. Until then, the apple market should remain steady. Reds, Granny Smiths, and Fujis will be in good supply throughout the summer. Prices for Honey Crisp and Pink Lady apples will rise in July, and most shippers will finish their golds in the next couple of weeks.

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



Asparagus



Mexican asparagus has improved this week due to better weather in the region. Peruvian volume is also better and is expected to continue improving over the next two weeks. Jumbo sizing remains limited. Expect the market on both coasts to gradually stabilize.

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



Avocados



Ripening times for the current Normal crop will remain shorter until the next crop is ready. Flora Loca has begun, but only in very light quantities. Maturity levels are still lower compared to the Normal crop, which continues to be shipped. Shippers are taking every precaution to ensure that fruit does not get mixed on the same pallet. California production is ongoing and will continue through August. Colombian fruit is arriving on the East Coast, with volume expected to gradually decrease as the current crop winds down. Peru is also supplying fruit and is expected to continue through late August.

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



Bell Peppers

The market remains steady at elevated levels. Volume in the East is low, with North Carolina finishing up and Michigan yet to start. As a result, California has seen strong demand, but extreme heat in the valley is limiting the harvest. Canadian colored bell production is also light due to quality issues, and California's supply is insufficient to meet demand. Expect markets, particularly for colored peppers, to remain active for the next several weeks.

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

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

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Commodity Updates



Berries (Blackberries)

ALERT

Due to the extreme heat in Central Mexico and California a few weeks ago, plants are recovering very slowly. Additionally, recent rain in Mexico is causing further quality issues, reducing overall volume. As a result, demand is currently exceeding supply.

Commodity/Region	Supply	Price	Quality
California (Year Round)	High	\$\$\$	Fair



Berries (Blueberries)

The Pacific Northwest is currently dominating the market with an abundance of fruit from Oregon, Washington, and British Columbia. Michigan is also in its second or third week of production. Markets are expected to remain steady with a slight downward trend.

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



Berries (Raspberries)

Similar to the blackberry situation, plants in Mexico and California did not respond well to the excessive heat in late June. Recent rain in Mexico has further impacted quality and availability. Markets are expected to remain elevated through next week.

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



Berries (Strawberries)

Strong volume continues to come from the Salinas and Watsonville areas, although demand remains very light. As the plants move past their peak production, we can expect volume from these regions to begin tapering off.

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

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

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Commodity Updates



Broccoli

Broccoli supplies and quality are gradually improving in Salinas, Santa Maria, and Mexico. Expect the market to continue easing as we head into the weekend.

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



Brussel Sprouts

The short supply of Brussels sprouts persists due to warm weather in Mexico, which has caused discoloration and an increase in pests. The market is expected to remain steady next week.

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



Carrots

Bakersfield is the primary growing region this week, followed by the Cuyama/Santa Maria area, which will continue through October. Everything looks promising for the upcoming season, with ample acreage and good supplies.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	Steady	\$\$\$	Excellent
Kern County (October - Feb)	Steady	\$\$\$	Excellent



Cauliflower

Cauliflower supplies are steady, with good quality coming from Salinas, Santa Maria, and Mexico. All sizes are available at competitive prices, and the market is expected to remain stable through the weekend.

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



Celery

Steady supplies are expected throughout the week for this commodity, although demand is currently low. All sizes are available, and multiple suppliers are flexible with volume-type orders, so promote as much as possible. Trucks can load both north and south. Overall, the quality of the product remains above average from most shippers.

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

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

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Commodity Updates



Citrus (Lemons)

Fruit is peaking at 115 ct and larger sizes, while 165 ct and smaller sizes will remain extremely tight throughout the summer until District 3 begins in mid to late September. Markets for 140 ct and smaller will continue to be strong. District 1 (San Joaquin Valley) has finished, leaving District 2 (Oxnard/Ventura County) as the main growing region, which is currently peaking on larger fruit. Additionally, offshore supply on the West Coast has started to come in lightly, providing some relief to domestic lemon availability.

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



Citrus (Limes)

The market remains steady. Recent intermittent rain is expected to improve sizing in the coming weeks, though overall supplies are anticipated to decline in August. Quality is acceptable, but the size distribution will begin to shift toward larger sizes.

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



Citrus (Oranges)

Valencias are the primary variety and are performing strongly in a steady market. Demand is starting to pick up slightly with some school business returning, but harvest levels remain on the lower side as growers aim to extend this short Valencia season. Fruit is peaking at 72 ct and larger, while 88, 113, and 138 ct sizes will be tight throughout the Valencia season once schools resume. Valencias are currently available in the Central Valley and Riverside, with Brix levels in the 12 range. Additionally, offshore Chilean fruit is beginning to arrive on the West Coast this week.

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



Cucumber

Supply is adequate, with good volume and quality coming from Baja. However, Central Mexico's volume crossing through McAllen is light due to recent weather. Eastern supply is also transitioning to northern areas.

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



Eggplant

Volume and quality from the San Joaquin Valley are good. While there is still some availability in the Carolinas, local deals are expected to begin in the coming weeks.

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

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

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Commodity Updates



Garlic

Garlic production in Mexico remains limited, though the quality is fair. The market is expected to stay steady over the next few weeks, with domestic supplies anticipated to begin arriving around late July or early August.

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Light	\$\$\$	Fair
Bakersfield, California (Year Round)	Light	\$\$\$	Fair
Gilroy, California (Year Round)	Light	\$\$\$	Fair



Grapes (Green)

Mexican grapes are nearly finished for the season, as extreme heat in the growing regions led many growers to wrap up early. However, there are still a few lots of Mexican red globes available. Domestic grapes will see a significant volume increase this week as the main district in the San Joaquin Valley ramps up production. High field temperatures are limiting the hours crews can pick, but the crop is reported to be of excellent quality and volume. Barring any unseasonal rainstorms, we expect a steady supply of California grapes until late November or early December.

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



Grapes (Red)

Mexican grapes are nearly finished for the season, as extreme heat in the growing regions led many growers to wrap up early. However, there are still a few lots of Mexican red globes available. Domestic grapes will see a significant volume increase this week as the main district in the San Joaquin Valley ramps up production. High field temperatures are limiting the hours crews can pick, but the crop is reported to be of excellent quality and volume. Barring any unseasonal rainstorms, we expect a steady supply of California grapes until late November or early December.

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



Green Onions

Green onions are abundant this week and show improved quality, with expectations for a continued strong supply into next week.

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



Kale

Kale supplies are expected to be abundant and of high quality this week, providing an excellent opportunity for promotion.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Salinas, CA (May - OCT)	High	\$\$\$	Good

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

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Commodity Updates



Lettuce Iceberg

Overall, the market is steady, though there is a slight pricing gap within the industry. Some suppliers are harvesting jumbo-sized lettuce due to warm temperatures in the growing regions. The reduced demand from schools being out has led to a backup of inventory among various shippers. There are currently no value-added lettuce items experiencing escalation. Reports indicate discoloration of outer leaves, misshapen heads, and heavy weights.

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



Lettuce Leaf

The lack of demand, combined with warm temperatures across all growing regions, has resulted in plentiful supplies of romaine, green, and red leaf lettuce throughout the industry. Good supplies of romaine hearts are also available. Shippers are flexible, and while temperatures are expected to cool off this week, we anticipate strong supplies for all leaf items. Light tip and fringe burn may start to appear due to the excessive heat in recent weeks. Overall, weights and sizing will continue to be above average for all leaf products.

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



Lettuce Tender Leaf

Tender leaf items such as spinach, spring mix, parsley, and cilantro have been significantly affected by the recent high temperatures. Over the next week, you can expect to see yellowing, wilting, and generally softer textures. Supplies are anticipated to tighten as we head into the weekend.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Fair
Oxnard, California (Year Round)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Melon (Cantaloupe)

The cantaloupe market is steady, with excellent quality from the new crop in Central California. Due to the recent heat wave, the new crop is peaking on Jumbo 9s and 9s, while smaller fruit is commanding a premium. Brix levels are in the 14-17 range. Retailers are looking to promote ADS at the end of July and beginning of August for all melons. Specialty melons are currently available in the desert.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	High	\$\$\$	Excellent

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

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Commodity Updates



Melon (Honeydew)

The honeydew market is steady, with shippers successfully increasing their inventory of the new crop. The new crop is peaking on Honeydew 5s and Jumbo 5s. Crossings from Mexico are lower, resulting in a gap for smaller fruit, making Honeydew 8s a premium. Brix levels are between 14-18%.

Commodity/Region	Supply	Price	Quality
Arizona (June-July) (October-November)	Steady	\$\$\$	Excellent
Central America (December - May)	Steady	\$\$\$	Excellent



Melon (Watermelon)

The Arizona season has ended, and watermelons are now available in California, Kentucky, North Carolina, and South Carolina. There is steady demand post-holiday, with retailers actively promoting summer fruit.

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



Mushroom

Supplies and availability are excellent.

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



Onions

ALERT

High temperatures in California are causing production delays, resulting in elevated prices in New Mexico due to shortages in California.

Commodity/Region	Supply	Price	Quality
South Texas (July-April)	Steady	\$\$\$	Good
Tri-Cities, Washington (July-April)	Light	\$\$\$	Fair
California Desert (April - May)	High	\$\$\$	Excellent



Pears

New crop California pears are starting this week, although the crop is down 20% from last year and supported by high prices from canneries. Expect California prices to begin high and remain elevated. Washington's crop is also projected to be down in volume, with the Wenatchee area particularly affected by frost during bloom, leading some shippers to doubt the viability of their crop in that district. The Yakima and Hood River districts are also expected to be down by 20% compared to last year.

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

Supply is insufficient to meet demand, with contracted business prioritized. Costa Rican pineapples are facing reduced crossings due to low rainfall, with the new Costco crop expected in week 32. Mexican pineapples are affected by heavy rains, resulting in internal issues and lower Brix levels that do not meet U.S. standards.

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



Potatoes

ALERT

With Norkotahs finishing up and Burbanks becoming the primary variety, stocks of 40-70 CT have become quite limited. However, there are abundant supplies of 80-120 CT and 6 oz #2s available.

Commodity/Region	Supply	Price	Quality
Bancroft, Wisconsin (August-July)	Steady	\$\$\$	Excellent
Idaho Falls, Idaho (August-July)	High	\$\$\$	Excellent
Monte Vista, Colorado (August-July)	Steady	\$\$\$	Excellent
Pasco, Washington (August-July)	High	\$\$\$	Excellent



Squash

There are good supplies coming from several production areas in the East. Out West, Baja, Santa Maria, and the Northwest are offering squash. Overall quality is good, and we expect strong supplies to continue for the next several weeks.

Commodity/Region	Supply	Price	Quality
Mexico (November - May)	Steady	\$\$\$	Good
California (May - Oct)	Steady	\$\$\$	Good
Ohio/MI/OH/NJ/NC (June - September)	Steady	\$\$\$	Good



Stone Fruit

Peaches, plums, and nectarines in the Central Valley are seeing slight price increases due to a heat wave that limits crew working hours. However, both supply and quality remain good. Pluots have started arriving from several Central Valley shippers and will continue through August. The apricot season in California has ended, while Washington's season has begun, albeit lightly. The Chilean kiwi market remains steady.

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



Tomatoes

Markets remain elevated, with romas being the most limited. The East Coast has not fully transitioned to Tennessee yet, resulting in light volume to start. In the West, southern Baja districts are finishing up, while northern areas are also light due to weather. The hot temperatures in the San Joaquin Valley have led to some heat-related quality issues, and we anticipate lighter supplies in August due to bloom drop from the extreme heat. Markets are expected to remain active throughout the summer.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Good
Florida (November-May)	Light	\$\$\$	Good
Baja California (Spring/Summer - NOV)	Light	\$\$\$	Good
California (July - OCT)	Light	\$\$\$	Good

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

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FRESH LINK



Weather Updates



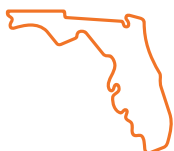
CALIFORNIA

Inland temperatures will jump back to heat wave levels through the weekend, but coast and coastal valley field temperatures will remain near to slightly above average due to the lack of offshore flow. Daytime highs near the coast will range from the upper 50s to low 70s at the coast, low 80s to low 90s in the coastal valleys, and upper 80s to 108 south of Soledad.



MEXICO

Over the next five days, shower activity will be isolated to scattered. Most showers will produce rainfall totals between 0.05" and 0.30", but some T-storms may produce higher amounts. By the end of the week, temperatures will be near to a couple of degrees below average. During the weekend, maximum temperatures will be in the low 70s to low 80s with morning temperatures in the upper 50s to mid 60s.



FLORIDA

As we move toward the weekend, a cold front will push toward the southeast and stall over higher terrain west of the area. Under weaker synoptic flow, some air mass t-storms and sea breeze showers/t-storms will remain possible into the weekend ahead of the front. Most showers will produce rainfall totals between 0.02" and 0.20", but T-storms may yield higher totals.



ARIZONA

Today and Thursday, temperatures will remain in the 105-110 range in Yuma, and 110-115 in southeast California. Over the weekend, some warming is likely along with a surge of monsoon moisture, bringing chances for isolated showers over Yuma and central Arizona by Friday. Toward the weekend, light-moderate southerly winds with gusts up to 20mph gradually weaken.

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

Freight Updates



Freight rates this week ease from California post-holiday, as expected. Great time to reach out to see what Pro*Fresh can do for your FTL and LTL requests.



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

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

	07/01/24	07/08/24	07/15/24	Change from	
				week ago	year ago
U.S.	3.813	3.865	3.826	↓ -0.039	↑ 0.020
East Coast (PADD1)	3.898	3.934	3.908	↓ -0.026	↑ 0.029
New England (PADD1A)	4.096	4.101	4.109	↑ 0.008	↑ 0.028
Central Atlantic (PADD1B)	4.076	4.087	4.067	↓ -0.020	↓ -0.025
Lower Atlantic (PADD1C)	3.812	3.861	3.829	↓ -0.032	↑ 0.050
Midwest (PADD2)	3.729	3.803	3.745	↓ -0.058	↑ 0.019
Gulf Coast (PADD3)	3.549	3.598	3.551	↓ -0.047	↑ 0.045
Rocky Mountain (PADD4)	3.745	3.790	3.750	↓ -0.040	↓ -0.177
West Coast (PADD5)	4.447	4.454	4.450	↓ -0.004	↓ -0.015
West Coast less California	4.039	4.018	4.030	↑ 0.012	↓ -0.101
California	4.915	4.955	4.932	↓ -0.023	↑ 0.084

*prices include all taxes

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

Crop Update



Mother Nature continues to challenge growers across the U.S. with heat waves, strong winds and thunderstorms. The heat continues across the East, while record high temperatures are not forecast numerous record high minimum (overnight) temperatures are likely throughout the Mid-Atlantic and Northeast. Many of these regions produce regional supplies during the summer months, lessening demand for product from California. Yields and quality are likely to be impacted as harvests get underway.

The persistent high-pressure ridge out west looks to retrograde back to the west late this week once again bringing very warm temperatures to the region. Excessive Heat Warnings, Watches and Advisories remain in effect across portions California, Oregon, Idaho, and Arizona. Temperatures anywhere from 10-20 degrees above average along with warm overnight temperatures are expected late this week into next week.

The timing and duration of these warm temperatures continues to be problematic for growers. Very warm temperatures are usually not seen until later in the summer and the early seed varieties are not well adapted to the heat. The good news is we are moving into later plantings and these varieties are better able to handle the warm temperatures.

In the coastal valleys of Salinas and Santa Maria Valleys iceberg lettuce stands are showing some irregular densities along with increased fringe and tip burn along with improved texture. Leaf lettuce and romaine fields are showing fringe burn, along with some seeder and internal burn. These supplies will continue to show some premature pinking along the ribs that is not seen during harvest and tends to show up during transit and storage. Insect populations continue to rise in the warm temperatures with aphids, flies and other pests reported. As growers combat the bugs with insecticide sprays the small flies and gnats tend to hide and accumulate in between the leaves as they die off making them very difficult to find and remove during harvests.

The tender leaf, spinach, spring mix, parsley and cilantro crops are especially susceptible to the warm temperatures. Bolting/seeder, yellowing, discoloration, wilting and a generally thin/weaker texture look to continue in these stands. Extreme heat can cause physiological changes in the plants causing leaf sensitivity resulting in a thin, weaker overall texture. For fresh-cut items this can result in increased mechanical damage and bruising during harvest and processing. Processed items will likely see an increase in discoloration and breakdown showing up in the bag affecting quality and shelf life.

It is very important to maintain the cold chain at every step and keep inventories in check as the quality and shelf life of most crops, especially processed items, will be challenged as the heat continues.



TIM LYNCH
QUALITY ASSURANCE MANAGER