

The Source

Commodity of the Month - Tender Leaf

MARKET ALERTS

Asparagus: Large to Jumbo sizes remain limited, while Smalls and Standards are more available. Overall supply is tight, lifting the market. Cooler weather slows Peruvian growth, and Mexican regions are transitioning amid heat and rain. Asparagus supplies will stay tight for weeks.

Strawberries: Salinas and Watsonville are declining, while Santa Maria ramps up this week and Oxnard follows in late September. Strong demand is pushing the market higher.

Lettuce (Iceberg): Demand exceeds supply as schools start, keeping production tight this week. Value-added lettuce prices are up, with some misshapen heads and lightweight (34-38 lbs) reported.

Lettuce Leaf: With schools reopening, demand is up for green and red leaf lettuces and romaine hearts. Some tip and fringe burn is reported, but shippers are trimming affected areas. Smaller sizing has increased 30-count romaine packs. Markets are expected to stay strong this week.

Pineapple: Heavy storms in Costa Rica limit pineapple supplies. Crownless pineapples are in high demand. Tariffs rose 10-15%, causing substitutions, cancellations, and order changes.

Tomatoes: Roma tomatoes have light to moderate supply; Baja yields are lighter. Round tomatoes are light in the East, steady in the West. Grape tomatoes are tight in the East, steady from Baja and Central Mexico.

IN PEAK SEASON



AUGUST 13, 2025

CROP UPDATES

As August progresses, Salinas Valley's fall transition is underway. Yields and quality are declining, with lighter weights in romaine and iceberg. Insect and disease pressure — like fusarium, thrips, and diamondback moth — is rising, affecting broccoli, cauliflower, cabbage, and Brussels sprouts. Lettuce faces seeder, mildew, and insect damage. Iceberg prices remain high due to lower yields. Harvests in Huron and Yuma are upcoming, but Salinas remains the main area. Expect tighter supplies and active markets into September. Close supplier communication and fast planning are key. [Read more](#)

WEATHER

California: High pressure brings above-average temps inland Wednesday; cooler near coast. Lows 50s-60s, highs 60s-102. Cooling starts Thursday, with milder weekend highs.

Mexico: Showers and storms continue through the weekend with light rain. Temps stay warm, highs 70s-80s, lows mid 50s to low 60s.

Florida: Isolated to scattered thunderstorms expected in Florida through Aug 17. Rain 0.05"-0.30". Warm, humid with highs 80s-90s and lows 70s. Winds 15-20 mph.

Arizona: Cooling, clouds, and humidity increase through Friday with monsoonal showers in central Arizona. Phoenix may see scattered storms; no rain expected west of Gila Bend.

FREIGHT

Freight market this week is steady with good truck availability in most regions across the US. Our team is currently responding to RFPs and addressing fall freight programs into several US regions. Feel free to reach out to us if you have any interest in creating a freight program that works for you!

PRO*FRESH
LOGISTICS



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Commodity Updates



Apples

The apple market is shifting from old crop to new. Fuji, Golden Delicious, Honeycrisp, Cosmic Crisp, and Pink Lady are approaching the end of their season, while supplies of Red Delicious, Granny Smith, and Gala are starting to dwindle. New crop Gala and Ginger Gold are now shipping, with Honeycrisp expected to begin within the next two weeks. Fresh Granny Smith, Red Delicious, Fuji, and Ambrosia will follow in September.

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



Asparagus

ALERT

Large, Extra Large, and Jumbo sizes remain limited on both coasts, while Smalls and Standards are more available. Overall supplies are tight, pushing the market up. Cooler weather is slowing Peruvian growth, and Mexican regions are transitioning with heat and rain. Asparagus supplies are expected to stay tight for the next few weeks.

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



Avocados

Peak sizes are 48 and 60 count, with Flora Loca as the main crop since the old crop is nearly finished. Dry matter is in the mid-20s, compared to the low 30s of the older crop, meaning the new crop will take longer to ripen. Fruit is very clean, with minimal #2 grade fruit, typical for this season. California's season is slowing and expected to end in a few weeks. Offshore fruit is arriving on both coasts and should begin to wind down next month.

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



Bell Peppers

Markets remain steady with good supply of green bells, sourced from the Midwest, Northeast, California, and other local regions. Red bell production is low in California, Central Mexico, and Canada, keeping prices high over the next two weeks before relief is expected.

Commodity/Region	Supply	Price	Quality
California (May - June)	Steady	\$\$\$	Excellent
Ohio (Jun - Sept)	Steady	\$\$\$	Excellent

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

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Commodity Updates



Berries (Blackberries)

Supply varies by shipper, but overall availability is expected to improve in the next two weeks with product coming from Central Mexico and Oregon.

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

The Pacific Northwest continues to produce as Oregon winds down quickly, with Washington's volume on the rise. Michigan and New Jersey are nearly finished for the season. Light arrivals of Peruvian imports have begun.

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

Supply has been steady from Baja, Central Mexico, and California.

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

ALERT

Salinas and Watsonville are in a declining cycle, while Santa Maria is set to ramp up this week, with Oxnard to follow in late September. Strong demand is driving the market upward.

Commodity/Region	Supply	Price	Quality
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California (Year Round)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Only the Finest Berries™



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Commodity Updates



Broccoli

Broccoli supplies and quality remain strong across all growing regions, with similar conditions expected through next week. The market is expected to stay steady.

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



Brussel Sprouts

Brussels sprout supplies are gradually improving, with good quality and a slowly easing market. Similar conditions are expected into next week.

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



Carrots

Harvest has shifted to the Cuyama and Lancaster areas, running through November. Jumbo sizes are limited this week as crews work fields with smaller fruit from the past weekend, but larger sizing is expected by the end of the week.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	High	\$\$\$	Excellent
Kern County (October - Feb)	Steady	\$\$\$	Good
Various Northwest Regions (July - October)	Light	\$\$\$	Good



Cauliflower

Cauliflower supplies remain strong across all areas, with good quality and minor yellowing reported. The market is expected to stay steady through the weekend.

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



Celery

All sizes of this commodity are readily available, and this production pattern is expected to continue throughout the week. Shippers are flexible, so promote heavily. Oxnard, Santa Maria, and Salinas remain the main growing regions. Overall quality is strong, with minimal seeder reported.

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 40 count and larger sizes, shipping from Riverside and the San Joaquin Valley.

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



Citrus (Lemons)

Markets remain strong with District 2 (Ventura/Oxnard) as the only growing region. Sizes 165 count and smaller are very limited. Choice grade dominates due to growing conditions, with fair quality including softer fruit and early decay. Coastal winds and moisture contribute to these issues. Shippers are culling compromised fruit. Prices are higher than last summer due to strong demand and reduced imports. Offshore fruit is arriving lightly, and Mexican supplies are down year over year.

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)

Storms in Central Mexico are delaying lime maturity and causing quality issues like defects and decay. Yields are down, tightening distributor allocations. Fruit is peaking on medium sizes with low South Texas crossings. Colombian fruit is available in Florida with moderate quality. Markets are expected to stay active through September.

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



Citrus (Oranges)

Valencias are currently peaking on 88 and 113 count, with sizing expected to increase as the season progresses. Gas times to color the fruit are around 24-48 hours. Brix levels are near 13, and the fruit is eating well. School demand is picking up, with markets steady now but likely to rise in the coming weeks.

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



Cucumber

Supply remains steady from Otay, McAllen, and regions like Michigan and Ohio. Overall quality is good, especially from Baja. Nogales season begins in October.

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

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

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Commodity Updates



Eggplant

Strong Eastern supply from multiple regions and local programs. West (Fresno) steady, with Washington ramping up harvests. Availability is expected to increase next week.

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



Garlic

The new California garlic crop is progressing with good quality, complemented by ongoing Mexican supplies.

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)

California's Central Valley is in full production across all districts, offering excellent quality and steady, reasonably priced fruit. Portion-pack grapes for school programs are available from multiple shippers. Domestic grapes are expected to last through the first week of December, making now an ideal time for promotion.

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

Green onion supplies are very good, with strong quality expected to continue into next week.

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



Kale

Kale supplies are good, with minimal yellowing reported. The market is expected to remain steady.

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

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

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Commodity Updates



Lettuce Iceberg

ALERT

Demand exceeds supply as schools start this week. Production is expected to remain tight throughout the week. All value-added lettuce prices are higher. Several shippers report misshapen heads and lightweights, with weights ranging from 34 to 38 pounds. Please be aware.

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



Lettuce Leaf

ALERT

With schools reopening, green and red leaf lettuces, along with romaine, are seeing increased activity. Demand for romaine hearts is also stronger. Several suppliers report slight tip and fringe burn, but shippers are trimming affected areas as much as possible. Smaller sizing has led to more 30-count romaine packs. Expect markets to remain strong throughout the week.

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



Lettuce Tender Leaf

Tender leaf supplies remain steady with consistently good quality. Similar conditions are expected 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 domestic cantaloupe market on the West Coast has normalized, with lower demand and better supplies creating a competitive environment. Warm weather is producing high-quality cantaloupes, peaking on 9 and 12 counts with Brix levels between 13 and 16. Volume deals are available.

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 domestic honeydew market on the West Coast has normalized, with lower demand and improved supplies leading to a competitive market. Warm weather is producing high-quality honeydews, peaking on 5-count, with Brix levels between 13 and 16. Volume deals are available.

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 on both coasts, with demand shifting to the West due to quality. Prices are expected to remain low, especially for larger fruit, through the holiday.

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

Promotable volumes are available nationwide.

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

Onions are currently available from California, Washington, Idaho, New Mexico, and Texas. California's season will continue through August, while New Mexico is nearing the end. Demand remains strong as Mexican onions face declining yields. Red and white onions have stabilized since last week. Idaho supplies are limited but expected to improve, and Washington has good availability.

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



Pears

Washington Bartlett pears are now in season, with volumes set to rise through August. California Bartletts remain aggressively priced and will continue to impact the market for the coming weeks. California Bosc and Red pears are also available.

Commodity/Region	Supply	Price	Quality
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Sacramento Valley (July-September)	High	\$\$\$	Good
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

ALERT

Heavy thunderstorms are affecting growing regions in Costa Rica, leading to limited pineapple supplies. Crownless pineapples remain in high demand. Tariff rates have increased by 10-15%, causing some substitutions, cancellations, and order changes.

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 potatoes through the end of August. Burbank varieties will be available throughout the summer. Pricing in Idaho and Colorado is expected to stay elevated short term. New crop potatoes are available now, with contracts open for 2025-2026. Quality is excellent, thanks to ideal growing conditions in Idaho. New crop Washington potatoes are also delivering great quality.

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

Multiple Eastern regions are producing with quality varying due to weather. West (Santa Maria) has lighter production, but new plantings are starting. California zucchini quality is good; yellow squash ranges from fair to good.

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

Peaches, plums, and nectarines are in good supply with a stable market. Specialty varieties like donut peaches and pluots are also available. Imported kiwi continues at steady but elevated prices, expected to hold until California's season begins in October. Asian pears from the Kingsburg area are anticipated to start later this month and run through at least Thanksgiving.

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

ALERT

Roma tomatoes have light to moderate supply with good overall quality; Baja is in transition with lighter yields. Round tomatoes face light Eastern volumes due to weather impacts, while the West remains steady; Baja is transitioning with reduced yields. Grape tomatoes have tight Eastern supply during transitions, with steady and good-quality supply from Baja and Central Mexico in the West.

Commodity/Region	Supply	Price	Quality
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Mexico (Year Round)	Light	\$\$\$	Good
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Florida (November - May)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Weather Updates



CALIFORNIA

Strong high pressure will bring above-average temperatures inland Wednesday, while a moderate marine layer keeps coastal temps near to slightly above average. Morning lows will range from the low 50s to low 60s. Daytime highs will reach the low to upper 60s along the coast, low to mid 80s in the coastal valleys, and 90s to 102 degrees south of Soledad. The high weakens Thursday, leading to a cooling trend away from the coast as the marine layer deepens through the weekend. Weekend highs will be in the mid 70s to low 80s in the coastal valleys and mid 80s to mid 90s south of Soledad.



MEXICO

Isolated showers and thunderstorms will continue through the weekend, with rainfall totals generally between 0.05" and 0.30," though higher amounts are possible in some storms. Temperatures will stay seasonably warm through August 17th, with highs ranging from the upper 70s to upper 80s on Wednesday, mid 70s to mid 80s from Thursday through Saturday, and low 70s to low 80s on Sunday. Lows will be in the mid 50s to low 60s through Sunday morning.



FLORIDA

Isolated to scattered afternoon and evening thunderstorms are expected across the Florida peninsula through August 17th. Rainfall totals will generally range from 0.05" to 0.30," with higher amounts possible in some storms. Temperatures will stay warm and humid, with highs in the upper 80s to mid 90s and lows in the low to upper 70s through Sunday morning. Peak wind speeds of 15 to 20 mph are anticipated through Friday and into the weekend.



ARIZONA

From today through Friday, expect some cooling with increasing clouds and humidity as monsoonal showers return to central Arizona. The Phoenix area may experience scattered showers and thunderstorms late tonight through Friday evening. No rain is expected west of Gila Bend.

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



Freight Updates

Freight market this week is steady with good truck availability in most regions across the US. Our team is currently responding to RFPs and addressing fall freight programs into several US regions. Feel free to reach out to us if you have any interest in creating a freight program that works for you!



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

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

	07/28/25	08/04/25	08/11/25	Change from	
				week ago	year ago
U.S.	3.805	3.800	3.754	▼ -0.046	▲ 0.050
East Coast (PADD1)	3.812	3.807	3.757	▼ -0.050	▼ -0.021
New England (PADD1A)	3.974	3.992	3.985	▼ -0.007	▼ -0.073
Central Atlantic (PADD1B)	3.945	3.958	3.942	▼ -0.016	▼ -0.019
Lower Atlantic (PADD1C)	3.746	3.733	3.666	▼ -0.067	▼ -0.015
Midwest (PADD2)	3.794	3.792	3.747	▼ -0.045	▲ 0.066
Gulf Coast (PADD3)	3.454	3.442	3.397	▼ -0.045	▲ 0.026
Rocky Mountain (PADD4)	3.781	3.793	3.776	▼ -0.017	▲ 0.079
West Coast (PADD5)	4.546	4.540	4.492	▼ -0.048	▲ 0.183
West Coast less California	4.189	4.188	4.148	▼ -0.040	▲ 0.235
California	4.957	4.946	4.889	▼ -0.057	▲ 0.126

*prices include all taxes

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



Crop Updates

Late Season Pressure in Salinas Valley

As we move through the back half of August, the fall transition is beginning to take shape in the Salinas Valley. While volume has remained relatively steady, several factors are starting to chip away at yields and quality.

Lately, lighter weights have become more common, especially in romaine and iceberg boxes. Some shippers are diverting products into secondary labels due to appearance and sizing issues. Premium labels are still available, but substitutions are becoming more common across the industry.

Insect and disease pressure continues to build. Fusarium and sclerotinia are showing up in more fields, particularly in third-rotation ground. Meanwhile, the potential for Indian Summer warmth could push insect activity even higher. Thrips pressure is on the rise, and so is diamondback moth activity across cole crops in both Salinas and Santa Maria. These pests are especially difficult to manage at this time of year, and growers are limited in their treatment options due to residue restrictions and pesticide resistance.

When diamondback larvae hatch, they feed on leaves and stems, then pupate in hard-to-reach places like under broccoli crowns or between cauliflower florets. This makes them tough for both harvest crews and processors to spot and difficult for insecticides to control. Along with thrips and aphids, these pests are contributing to ongoing pressure across broccoli, cauliflower, cabbage, and Brussels sprouts.

In lettuce, alongside lighter weights, crews are encountering seeder, mildew, internal burn, growth cracks, and insect damage, which varies from field to field. Iceberg markets dipped this past week, but with lower yields expected in upcoming lots, prices are projected to remain high through the end of the Salinas season. Looking ahead, Huron is expected to begin harvest in October, and bed prep is underway. Yuma plantings will begin in September, but it's too early to get a clear read on crop conditions. We'll know more once early stands are up and growing. Salinas will remain the main production area, but with variability in the fields, we'll need to focus on weight and quality. As insect and disease pressure increase, we expect yields to tighten and markets to become more active as September approaches. Staying close to your suppliers and planning for faster turns can help manage what's shaping up to be a dynamic finish to the season.



JOEY PIEDIMONTE
SOURCING MANAGER