

# The Source

## Commodity of the Month - Apples

### MARKET ALERTS

**Blueberries:** A brief planting gap limits availability between Pacific Northwest season end and Peru/Mexico start. Current supply is mostly Peruvian, with Mexican volumes increasing in early October.

**Broccoli:** Broccoli supplies remain tight due to insect pressure in Salinas. Temps dip through Thursday, then warm up Friday. Some acreage is being skipped due to diamondback moths.

**Brussel Sprouts:** Brussels sprout yields are down from insect pressure, driving strong demand and higher prices into next week.

**Citrus (Lemons):** Markets are strong; District 2 is the only active region. Small sizes are very limited. Quality is fair with typical seasonal issues. Imports from offshore and Mexico are light, keeping prices high.

**Citrus (Oranges):** Valencias peak on 88ct; larger sizes are scarce. Gas times ~3 days; some regreening. Quality fair, Brix ~13. Navels start late October.

**Tomatoes:** Tennessee and Virginia crops have good quality and volume. California and others offer steady supply. Eastern grape tomato availability is improving. Baja and Central Mexico supplies are light due to rain and permits. Tomato crossings paused early but will resume soon.

### IN PEAK SEASON:

- Blackberries



- Raspberries



- Grapes



## SEPTEMBER 10, 2025

### CROP UPDATES

Idaho's new potato crop is off to a strong, promotable start with excellent quality and solid yields. Harvest is focused on fresh supplies, mainly Norkotahs, while Burbanks will ship later in fall. Markets are easing as volume grows, with Idaho and Washington leading in supply. Plan ahead for fall, as freight costs may push prices higher. [Read more](#)

### WEATHER

**California:** A low-pressure system is bringing cool temps and drizzle through Thursday. Warming begins Friday with highs rising into the 80s and 90s by the weekend.

**Mexico:** Showers and storms continue through Saturday, then taper Sunday. Temps steady in the low 70s to low 80s.

**Florida:** Showers and storms through Friday, then drying and warming this weekend. Temps range from low 80s to low 90s.

**Arizona:** Cooler temps through the weekend with highs mostly in the 90s; central Arizona stays hotter. Light to moderate westerly winds.

### FREIGHT

Freight this week is active from California to Florida and Idaho/Washington and out. Advanced pre booking is highly encouraged when booking freight into these places.

# Table of Contents



[Apples](#)



[Citrus \(Grapefruit\)](#)



[Melon \(Cantaloupe\)](#)



[Asparagus](#)



[Citrus \(Lemon\)](#)



[Melon \(Honeydew\)](#)



[Avocados](#)



[Citrus \(Limes\)](#)



[Melon \(Watermelon\)](#)



[Bell Peppers](#)



[Citrus \(Oranges\)](#)



[Mushroom](#)



[Berries \(Blackberries\)](#)



[Cucumbers](#)



[Onions](#)



[Berries \(Blueberries\)](#)



[Eggplant](#)



[Pears](#)



[Berries \(Raspberries\)](#)



[Garlic](#)



[Pineapples](#)



[Berries \(Strawberries\)](#)



[Grapes \(Green/Red\)](#)



[Potatoes](#)



[Broccoli](#)



[Green Onions](#)



[Squash](#)



[Brussel Sprouts](#)



[Kale](#)



[Stone Fruit](#)



[Carrots](#)



[Lettuce Iceberg](#)



[Tomatoes](#)



[Cauliflower](#)



[Lettuce Leaf](#)



[Celery](#)



[Lettuce Tender Leaf](#)

# Commodity Updates



## Apples

Can we fast forward apple packing by two weeks? The market remains in a gradual transition from old crop to new, and availability continues to lag behind demand. Growers are pushing to get the last cartons of Granny Smith and Fuji out of storage, but supply remains tight. Gala production is expected to accelerate this week and next, while Honeycrisp is already packing in solid volumes, with market pricing adjusting accordingly. September will bring fresh availability of Granny Smith, Red Delicious, Fuji, and Ambrosia—as harvest progresses.

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



## Asparagus

**ALERT**

The asparagus market is beginning to strengthen on both coasts, with production ramping up in both Peru and Mexico. Supplies are gradually increasing, and prices are expected to ease slightly as we head into next week.

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



## Avocados

Peak sizes are 48ct and 60ct, with Flora Loca now the primary crop as the old crop has mostly finished. Dry matter is in the mid-20s, compared to low-30s in the older crop, meaning the new fruit will take longer to ripen. Overall quality is excellent, with very little #2 grade fruit—typical for this time of year. California's season is gradually slowing and is expected to wrap up in a few weeks. Offshore fruit is arriving on both coasts, with volume expected to taper off next month.

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



## Bell Peppers

Eastern regions are delivering consistent, high-quality supplies, while Western and California areas continue to show strong production with promotable volumes available. Availability of colored bell peppers is improving as the market moves toward stabilization.

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

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

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# Commodity Updates



## Berries (Blackberries)

Blackberries will remain readily available going into September. Market demand is currently soft, and some volume-based pricing is being offered to help stimulate movement.

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



## Berries (Blueberries)

**ALERT**

We're currently in a brief planting gap between the end of the Pacific Northwest season and the start of the Peruvian and Central Mexico programs. Product availability is limited during this transition period. Most current offerings are offshore fruit from Peru, while Mexico is expected to gradually ramp up crossings as we move into early October.

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



## Berries (Raspberries)

Raspberry production remains strong, while demand is moderate at best. Supply is coming from Baja, Central Mexico, and California. With ample availability and softer demand, volume deals are currently being offered to encourage movement.

Commodity/Region	Supply	Price	Quality
California (Year Round)	High	\$\$\$	Good
McAllen (October - May)	Steady	\$\$\$	Good



## Berries (Strawberries)

A clear two-tiered market is emerging between late-season product from Salinas and Watsonville and new crop fruit out of Santa Maria. Santa Maria is commanding a premium, driven by stronger quality out of that region. Oxnard production is set to begin next week for some shippers, with others expected to follow in the next two weeks. Looking ahead, both the Mexico and Florida seasons are scheduled to begin in mid-November.

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

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

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# Commodity Updates



## Broccoli

**ALERT**

Broccoli supplies remain tight due to insect pressure from recent warm weather in the Salinas Valley. Temps will cool slightly through Thursday, then warm back up Friday. Some acreage is being skipped as growers manage quality and crew safety amid diamondback moth issues.

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



## Brussel Sprouts

Brussels sprout yields are down due to ongoing insect pressure, and strong demand is pushing the market higher. Expect prices to remain elevated heading into next week.

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



## Carrots

Harvest has shifted to the Cuyama/Lancaster area, where it will continue through November. Sizing has improved this week with access to better fields, and no sizing issues are expected in the near term. Updates will be shared if anything changes.

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



## Cauliflower

Cauliflower supplies remain strong this week. While there are some reports of insect pressure that could impact yields and potentially push the market up, conditions for now remain mostly steady.

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



## Celery

The market remains steady in both Northern and Southern California, with all sizes available. A few suppliers are showing some flexibility, so keep that in mind. Quality continues to be strong, with only minor seeder issues reported. Supplies are expected to remain steady through the week.

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

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

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# Commodity Updates



## Citrus (Grapefruit)

Marsh Rubies are available, peaking at 48ct, and shipping out of Riverside and the San Joaquin Valley.

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

California (Year Round)	Light	\$\$\$	Good
Texas (October - April)	Steady	\$\$\$	Good



## Citrus (Lemons)

**ALERT**

Markets are strong, with limited small sizes. District 2 is the only active region, producing mostly Choice grade due to coastal conditions. Quality is fair with typical seasonal issues. Imports from offshore and Mexico are starting in light volume, keeping markets elevated.

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

CA Desert/Yuma (October - February)	Steady	\$\$\$	Good
Oxnard/Ventura (February - September)	Light	\$\$\$	Fair
San Joaquin Valley (October - May)	High	\$\$\$	Good



## Citrus (Limes)

The market is slightly lower as demand has softened. A new production cycle is bringing smaller fruit with improved color and slightly longer shelf life. Offshore Colombian fruit is also available out of Florida with good quality. The market is expected to remain active through September.

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

Veracruz (Year Round)	Steady	\$\$\$	Fair
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## Citrus (Oranges)

**ALERT**

Valencias are peaking on 88ct, with very limited 113ct and 138ct due to strong school demand. Expect more requests to sub up in size as smaller fruit becomes scarce. Gas times are around 3 days to enhance color, with some regreening from recent heat. Quality is fair, with mostly Choice grade, typical for the season. Brix levels are around 13, and the fruit is eating well. The domestic Navel season is expected to start at the end of October.

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

San Joaquin Valley (Year Round)	Light	\$\$\$	Fair
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## Cucumber

Eastern supplies remain light but are meeting current demand. Production in Georgia and North Carolina is expected to pick up next week. Recent rain in Baja reduced harvest and has tightened supplies from the region.

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

Baja California (May - October)	Light	\$\$\$	Fair
Ohio/NC/MI/NJ (June - September)	Steady	\$\$\$	Good
Mexico (November - May)	Light	\$\$\$	Good

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

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# Commodity Updates



## Eggplant

Supplies from Michigan, New Jersey, and New York remain steady with good quality. The North Carolina harvest season is approaching and will begin soon. California production is moderate, providing enough overall supply to meet demand.

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



## Garlic

The new California garlic crop is progressing well with good quality, while Mexican supplies continue to complement the California harvest.

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)

Supply continues to outpace demand, as lingering inventories of earlier varieties weigh on the market. While the larger, higher-quality late summer varieties may warrant a stronger market price, any upward movement is unlikely without a meaningful increase in demand to help clear current volumes.

### 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

The green onion market has begun to rise due to recent rain and isolated thunderstorms in Mexico. Expect prices to increase slightly heading into next week.

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



## Kale

Kale supplies are expected to be plentiful this week and next, with good quality reported throughout.

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

Increased production from multiple shippers in the Salinas Valley has led to a surplus of product in the market. Overall demand remains moderate but is expected to strengthen as schools reopen over the coming weeks. While some light weights have been reported, average weights are holding steady between 37-42 pounds. Quality reports note some misshapen heads and occasional outer leaf discoloration. All value-added lettuce items have returned to normal pricing, with no current escalations.

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



## Lettuce Leaf

The market remains firm on romaine, as well as green and red leaf items. Romaine heart production is currently moderate to light, and this trend is expected to continue throughout the week across all leaf items. Some quality issues have been reported upon arrival, including tip and fringe burn. However, weights and sizing are ranging from average to above average. Overall, production should be sufficient to meet demand through the remainder of the week.

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



## Lettuce Tender Leaf

Supplies of all tender leaf items remain strong with good quality, and this trend is expected to continue 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 is firming up due to sizing shifts and stronger demand. Westside fields are in their second cut, still heavy on 9s, but 12s/15s are improving. Jumbos are tight. Brix levels are 13-16. Rain in the Central Valley this week has impacted some fields.

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 cantaloupe market is trending up as Westside fields enter their second cut. Demand is strong, with mostly 9s being harvested, but 12s and 15s are improving. Jumbos are tight, and Brix levels range from 13–16. Recent rain in the Central Valley has impacted some fields.

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 prices stabilizing as new crops come in. Mexican supply via Texas is also available. Post-holiday deals are expected.

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

Excellent supply and availability with strong promotable volumes.

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

Onions are currently shipping from Washington and Idaho, as the California and New Mexico seasons have wrapped up. Domestic demand remains strong. Rain in Idaho at the end of the week of 9/9 may affect harvest schedules.

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 in full swing, while California Bartletts remain aggressively priced, continuing to influence the market for the next few weeks. Red pears are being packed in both states, and California Bosc pears are available in heavy volume.

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

Thunderstorms continue to impact growing regions in Costa Rica and are expected to persist through the end of September 2025. Pineapple supplies remain very limited and may continue to be constrained for the remainder of the year. Crownless pineapples remain in high demand, so substitutions are likely. Despite these challenges, good quality fruit is being exported to both the U.S. and Europe. Transportation out of Mexico remains stable, with ample truck availability to support pineapple shipments.

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

Idaho's 40-70 count market has stabilized with new crop Norkoths leading. Burbanks are nearly done. #1 grade is plentiful; #2 is tight. Washington's new crop has good quality, mostly smaller sizes. Colored potatoes come from CA, ID, MN, WA, and WI. New crop sweet potatoes have started lightly in NC, with some curing issues expected.

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



## Squash

Supplies remain consistent across both Eastern and Western regions. New Jersey crops are wrapping up, while Georgia's season has begun. Baja and Santa Maria supplies are also available, with overall good quality.

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



## Stone Fruit

Peaches, plums, and nectarines are available in moderate supply with a stable market. Volume on nectarines and peaches is declining and expected to finish before the end of the month. Plums are expected to remain available the longest, with supplies likely lasting through at least Thanksgiving. Imported kiwi continues at steady but elevated pricing, which is anticipated to hold until California's season begins in October. Asian pears from the Kingsburg area have started and will be available through the end of the year.

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

**ALERT**

Tennessee and Virginia crops show good quality and volume. California and other regions provide steady supply. Grape tomato availability is improving in the East. Baja and Central Mexico supplies are lighter due to rain and export permits. Tomato crossings paused early week, expected to resume soon.

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

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

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# Weather Updates



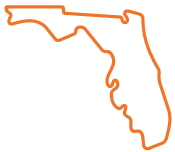
## CALIFORNIA

A low-pressure system passing to the north is bringing a deep marine layer, spotty drizzle, and near to slightly below average temperatures through Thursday. Morning lows will range from the mid-40s to low 60s, with daytime highs in the low to upper 60s along the coast, low 70s to low 80s in the coastal valleys, and upper 70s to mid-80s south of Soledad. The low moves away Friday, weakening the marine layer and triggering a warming trend through the weekend, with highs reaching the mid-70s to mid-80s in the coastal valleys and mid-80s to mid-90s further inland.



## MEXICO

Isolated to scattered showers and thunderstorms are expected through Saturday, with rainfall totals generally between 0.05" and 0.30", though heavier amounts may occur in some storms. By Sunday, showers will become more isolated. Temperatures will remain seasonal across Central Mexico, with highs in the low 70s to low 80s and lows in the mid-50s to low 60s through Sunday.



## FLORIDA

A frontal boundary will bring scattered showers and thunderstorms through Friday, with rain chances shifting southward and rainfall amounts decreasing as the week progresses. Locally heavy rains are possible within storms from Wednesday through Friday. Temperatures will be seasonal or slightly below, especially where showers limit daytime heating. Highs will range from the low 80s to near 90 through Thursday, then rise to the mid 80s to low 90s from Friday through Sunday. Lows will be in the mid 60s to mid 70s, cooling slightly over the weekend.



## ARIZONA

Slightly cooler-than-normal temperatures are expected through the weekend as a slow-moving low-pressure trough moves across the Southwest. Highs will reach the 90s in southwest Arizona and southeast California, while central Arizona stays between 100-104°F. From Thursday through Sunday, most areas will see highs in the 90s, with morning lows cooling to the upper 60s to low 70s by Friday. Winds will be light to moderate and westerly throughout the period.

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



# Freight Updates



Freight this week is active from California to Florida and Idaho/Washington and out. Advanced pre booking is highly encouraged when booking freight into these places.



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

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

	08/25/25	09/01/25	09/08/25	Change from	
				week ago	year ago
U.S.	3.708	3.734	3.766	↑ 0.032	↑ 0.211
East Coast (PADD1)	3.726	3.750	3.772	↑ 0.022	↑ 0.153
New England (PADD1A)	3.968	3.948	3.955	↑ 0.007	↑ 0.084
Central Atlantic (PADD1B)	3.916	3.912	3.937	↑ 0.025	↑ 0.090
Lower Atlantic (PADD1C)	3.631	3.669	3.693	↑ 0.024	↑ 0.185
Midwest (PADD2)	3.698	3.722	3.754	↑ 0.032	↑ 0.226
Gulf Coast (PADD3)	3.328	3.367	3.404	↑ 0.037	↑ 0.214
Rocky Mountain (PADD4)	3.748	3.753	3.754	↑ 0.001	↑ 0.187
West Coast (PADD5)	4.461	4.484	4.533	↑ 0.049	↑ 0.276
West Coast less California	4.103	4.112	4.163	↑ 0.051	↑ 0.326
California	4.873	4.914	4.958	↑ 0.044	↑ 0.219

\*prices include all taxes

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

# Crop Updates



## Idaho Potatoes: A Promotable Start to the Season

Idaho's new crop is off to a strong start, with early signs pointing to a season full of opportunity. Growers are reporting excellent quality, solid yields, and a well-balanced size profile, making this year's crop highly promotable across a wide range of packs and programs.

Most harvesting right now is focused on keeping sheds supplied, with the shift to filling long-term storage expected toward the end of the month. While Norkotahs are leading the charge, Burbanks have not started shipping yet. Those will come later in the fall, once they have had time to sweat and stabilize in storage, typically by October.

Idaho growers continue to favor Norkotahs for their consistent sizing, clean appearance, and improved cooking performance. This season's fresh-run Norkotahs are showing excellent quality, with strong skin set and good internal condition. A slight white blush may appear as potatoes cool and release moisture, but it is purely cosmetic and fades quickly. No. 2 grade supplies are still limited, though those will improve once storages open later this fall. Markets are gradually easing as more volume comes online in Idaho and Washington. Colorado and Wisconsin are running slightly behind, with harvests ramping up in September and larger sizes not expected in volume until late September or early October. For now, Idaho and Washington remain the most consistent options for promotable quality and supply.

Looking ahead, it is a great time to connect with your growers and start planning. With excellent early quality and a well-rounded size structure, this season is shaping up to be one of the more promotable crops in recent years. Just keep in mind that as we approach Q4, seasonal freight pressure often puts upward momentum on delivered pricing, especially when paired with low FOBs. Building in lead time and staying close to the field will help keep programs on track through the fall and beyond.



**JOEY PIEDIMONTE**  
**SOURCING MANAGER**