

The Source

Commodity of the Month - Tender Leaf Lettuce



MARKET ALERTS

Avocado: Markets have risen but are stabilizing as more Flora Loca becomes available; limited #2 grade fruit is expected through August and September due to slower ripening from recent rains, with dwindling supplies from California and Peru, requiring flexibility and early ordering for effective inventory planning.

Blackberries: Supplies remain very limited with demand exceeding supply, but improved availability is expected starting in the first week of September.

Strawberries: Market is active with increased school demand, and while Santa Maria is slowly increasing new crop numbers, it won't meet the rising demand this weekend, so early ordering is advised.

Oranges: Markets are strengthening with rising school demand, but limited Valencia harvests are creating supply issues, so consider offshore navels or other commodities as substitutes, with the Domestic Navel crop expected to start in mid to late October.

Green Onions: Extreme heat and humidity in Northern Mexico over the past two weeks are expected to reduce harvesting yields and likely drive up market prices in the coming weeks.

Pineapple: Supply is falling short of demand, with priority given to contracted business, as Costa Rican pineapples face issues from lack of rainfall and West Coast port delays, while larger fruit is scarce, Mexican crossings are down, and the new crop is expected in early September with quality issues due to heavy rains.

AUGUST 14, 2024

CROP UPDATES

Crop assessments are ongoing in various local growing regions following Tropical Storm Debbie, affecting crops like beans, cucumbers, and squash. Expect light yields and quality issues as growers harvest acreage. Fall crops begin production next month. [Read more](#)

WEATHER

Arizona - Moderate high pressure forecasts for the weekend, with temperatures ranging from 103-108°F in southwest Arizona to 107-112°F in southeast California, with moderate southerly winds.

California - High pressure and a moderate marine layer will cause below-average temperatures through the weekend, with morning lows in the 40s to 50s and daytime highs in the 60s to 70s.

Florida - A cold front moves in and stalls over southern Florida, shifting Georgia's stationary boundary south. Light showers are expected, with best chances in sea breeze boundaries or interior Florida. Warm temperatures expected.

Mexico - Expect isolated showers and thunderstorms through Thursday, with scattered showers and storms continuing into Friday and Saturday. Sunday may see more showers. Seasonal temperatures may be below normal, with highs in the mid 70s to 80s.

FREIGHT

Regional deals are ending, while Idaho and Eastern Washington open. Stability in the freight market is expected due to good weather patterns.



IN PEAK SEASON



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Commodity Updates



Apples

The new crop of Washington apples is underway, with early Galas, Ginger Golds, and Honey Crisp beginning harvest this week. This year's crop is expected to be about 12% smaller than last year's, with reduced volumes for Honey Crisp, Galas, and Granny Smiths. September will bring the harvest of reds, golds, Fujis, and several proprietary varieties, while Pink Lady apples will follow in October. The 2023 crop faced challenges with surpluses in Galas and Granny Smiths, but both varieties are expected to see improved markets in 2024.

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



Asparagus

Mexican asparagus is still readily available from McAllen, TX, Los Angeles, CA, and Salinas, CA, particularly in smaller sizes. Three key regions in Mexico—Southern Baja, Northern Baja, and Central Mexico—are currently harvesting. However, Jumbo and XL sizes remain scarce. Meanwhile, Peruvian asparagus supplies are steady, with a slight decrease in the north offset by new production areas opening in the south.

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



Avocados



Markets have risen significantly but are stabilizing as more Flora Loca crop becomes available. Typically, Flora Loca floods the market, but this year is different due to the need for oil content to reach at least 24% before harvesting. Recent rains in Mexico have slowed dry matter development, resulting in longer ripening times and limited #2 grade fruit through August and September. The Negra crop is being shipped sparingly and is nearing its end. California supplies are dwindling and will last through August, while Peruvian supplies are also decreasing and expected to continue through August. Flexibility with country of origin and size exceptions will be necessary to fulfill orders. Please provide as much lead time as possible for ripening and inventory planning. Availability is subject to current averages.

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



Bell Peppers

Markets are slightly lower as supplies gradually increase from all local areas in the East and California. We anticipate a further boost in California supplies as coastal areas ramp up production. However, red varieties remain in very short supply, with no immediate relief in sight. California is still facing heat-related quality issues, but the slightly cooler temperatures this week should help improve overall production.

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

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

Key Partners



Commodity Updates



Berries (Blackberries)

ALERT

Blackberry supplies remain very limited, with demand still exceeding supply. We expect to see improved availability starting in the first week of September.

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

No significant changes yet. The Pacific Northwest, including Oregon, Washington, and British Columbia, still has a few weeks of production remaining. Central Mexico's volume will increase in early September, with Peruvian fruit following later in the month. Michigan's season is nearly finished.

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



Berries (Raspberries)

Production in Central Mexico and Baja has slightly decreased from last week's high volumes, but availability remains strong.

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



Berries (Strawberries)

ALERT

The strawberry market is becoming very active with the return of school demand. Volume is declining in the North due to reduced plant cycles, and while Santa Maria is gradually increasing new crop numbers, this won't be enough to meet the demand as we move into the weekend. We recommend placing orders as early as possible to ensure fulfillment.

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

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

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Driscoll's
Only the Finest Berries™



PRO*ACT

Commodity Updates



Broccoli

Broccoli supplies, while still somewhat limited, are beginning to improve with better quality. 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)	Steady	\$\$\$	Fair



Brussel Sprouts

Expect significantly improved availability with increased production and additional acreage coming online. As volumes rise, the open market is likely to soften. Extra capacity in both value-added and bulk pack categories should provide excellent opportunities for promotion.

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



Carrots

The Cuyama/Santa Maria area, the main growing region, will continue through October. Jumbos and Cellos are in tight supply, leading to higher markets, but normal business needs are being met. There is plenty of availability for baby and snack packs, which is ideal as schools return.

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



Cauliflower

Cauliflower supplies are anticipated to be abundant this week, provided there are no quality issues from the recent heat. This presents a great opportunity for promotion.

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



Celery

There are good supplies across all sizes, both in the north and south. Shippers are accommodating large orders, so promote as much as possible. Quality remains strong, with the best pricing available for Southern California loading in Oxnard and Santa Maria.

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 on 115ct and larger sizes, while 165ct and smaller sizes will remain extremely tight through the summer until District 3 begins in mid to late September. Markets for 140ct and smaller sizes will stay strong. With District 1 (San Joaquin Valley) finished, District 2 (Oxnard/Ventura County) is now the main growing region, focusing on larger fruit. Offshore supplies on the West Coast are starting to provide some relief for domestic lemons.

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



Citrus (Limes)

The market is elevated due to below-normal crossings through McAllen, TX. Although the new crop harvest has started and quality is expected to improve by mid-September, yields are 30% lower than usual. Rain in the growing region is likely to limit availability this week. Currently, fruit is peaking at 110/150ct, with mixed quality and reduced shelf life.

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



Citrus (Oranges)



Markets are strengthening with increased school demand. Harvests remain limited as efforts extend the short Valencia season. Valencias are available in the Central Valley (peaking on 56ct and larger) and Riverside (peaking on 88ct). Contracts are a priority, with some shippers allocating due to reduced supplies. Offshore navels are available and can substitute for Valencias, or consider other commodities like apples or grapes. The Domestic Navel crop will start mid to late October, with Valencia Brix around 12.

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



Cucumber

The market is steady with good availability in MI, NY, NJ, CAN, Baja, and Central Mexico. Cucumbers from Nogales are expected to start crossing in October.

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



Eggplant

Eastern supplies are sufficient to meet demand, but supplies from California remain limited and costs are higher. Volume and quality from the Fresno area are down due to recent hot temperatures.

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

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

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Commodity Updates



Garlic

The transition to the new crop harvest in California has officially begun. Quality is currently good, and supplies are expected to remain strong moving forward.

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)

The market for greens is currently very soft. Most shippers have three or four different varieties in stock, which puts them in a negotiating mood. Quality can vary between lots, and with grapes, you get what you pay for. This market trend is expected to continue for another week to 10 days.

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



Grapes (Red)

The market for reds is steady at higher prices. The brief gap between Flames and the next group of varieties has been bridged. Strong demand is likely to keep prices elevated.

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



Green Onions

ALERT

Due to the extreme heat and humidity in Northern Mexico over the past two weeks, we expect reduced harvesting yields, which will likely lead to higher market prices in the coming weeks.

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



Kale

Kale supplies are expected to be plentiful and of good quality this week, making it a great opportunity for promotions.

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

With schools starting up again, demand for this commodity has increased. Many suppliers are experiencing lighter availability this week compared to last. However, better production is expected by mid-next week. While the weather has been favorable, suppliers are managing a slight planting gap. Pricing is anticipated to be stronger but still competitive, and overall quality remains above average.

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



Lettuce Leaf

Romaine and red leaf will have good availability throughout this week, while green leaf availability has tightened with multiple shippers. Fringe and tip burn have been reported due to warm temperatures in the growing regions. Despite this, multiple suppliers are reporting good weights and length for all leaf items. Competitive pricing is expected in the marketplace as demand increases with the start of the school season.

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



Lettuce Tender Leaf

Due to the hot weather in recent weeks, cilantro is going to seed, leading to reduced yields and quality issues. Supplies are expected to remain tight through next week. Suppliers are proactively shifting to younger fields for harvesting, but this will result in smaller leaves and shorter heights.

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



Melon (Cantaloupe)

The cantaloupe market is steady with excellent quality from central California. Load volume deals are available for retailers looking to close out the "summer crop" strong. Due to the recent heat wave in California, the new crop is peaking on Jumbo 9s and 9s, with smaller fruit priced at a premium. Brix levels are in the 14-17 range. The heat wave at the start of the Westside deal is causing some bloom drop, leading to reduced yields, particularly for smaller sizes.

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

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

Key Partners



Commodity Updates



Melon (Honeydew)

The honeydew market is beginning to heat up as fields produce larger honeydews and supplies of smaller sizes decrease. Shippers are prioritizing honeydew contracts, so any orders for market honeydews may be filled with cantaloupe to manage inventory. There is potential for a gap in smaller honeydews due to bloom drop, as the higher yields at the start of the season have resulted in fewer melons per plant.

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



Melon (Watermelon)

Regional watermelon deals are available, with products peaking on larger sizes. Demand has been steady as retailers actively promote summer fruit.

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



Mushroom

The market is firming up as we approach the holidays, making it a good time to increase supplies.

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



Onions

California onions are currently limited. New Mexico supplies are expected to last another week, while Washington and Idaho are increasing their availability.

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



Pears

California pears, including Red Pears, Bartletts, and Bosc, continue to be available in good volume through the month and into September. Washington will begin with light volumes of Bartletts this week, with increased volumes expected next week. Due to frost during the bloom period, this year's Washington crop is significantly smaller than last year's, particularly in the Wenatchee district.

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

ALERT

Supply is falling short of demand, with contracted business remaining a priority. For Costa Rican pineapples, a lack of rainfall in the tropics has led to lower year-over-year crossings, with new crops expected to arrive in the U.S. during week 32. Meanwhile, Mexican pineapples are facing heavy rains that are causing internal issues and lower Brix levels, preventing them from meeting U.S. standards.

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



Potatoes

Idaho is in the final weeks of its storage crop, and pressure bruising and air checks are becoming more common. New crop Norkotahs are entering the market in limited quantities, with high production expected by the end of the month.

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



Squash

There is plenty of availability across multiple production areas, with Santa Maria and Michigan being the primary regions. Overall quality is good. Nogales is expected to begin with lighter volumes next month.

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 are in lighter supply due to the hotter summer temperatures, with shippers struggling to meet commitments due to heat-related defects. Both peach and nectarine seasons are likely to end in September rather than October. While plums are also affected, late-season varieties should extend their availability into November. Early pomegranates will start next week. The kiwi market is active as shippers have been slow to pack controlled atmosphere fruit, and prices are expected to rise over the next few weeks.

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



Tomatoes

The market is active, particularly for round tomatoes. Supplies from TN/NC have been fairly decent despite rainy weather, though there are reports of lower yields and quality concerns, which are mostly being addressed at the shipping point. Western supplies are steady but at lighter levels, with quality affected by the hot temperatures. The market is expected to remain very active, and demand may shift towards romas for order coverage.

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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Weather Updates



CALIFORNIA

High pressure and a moderate marine layer will result in near to slightly below-average temperatures through the weekend. Morning lows will range from the mid 40s to mid 50s, while daytime highs will be in the low 60s to low 70s along the coast, mid 70s to mid 80s in the coastal valleys, and mid 80s to mid 90s south of Soledad.



MEXICO

Expect isolated showers and thunderstorms through Thursday, with scattered showers and storms continuing into Friday and Saturday. On Sunday, more isolated showers may occur. Rainfall will range from trace amounts up to 0.20 inches in most cases, though higher totals may accompany some thunderstorms. Temperatures will be seasonal, possibly a few degrees below normal, especially where showers limit daytime heating. Max temperatures will range from the mid 70s to mid 80s, with lows in the mid 50s to mid 60s.



FLORIDA

A stationary boundary over Georgia will shift south today as a cold front moves in and stalls over southern Florida for the weekend. Shower activity will be generally light and isolated due to the relatively dry air associated with this front. The best chance for showers later in the week will be along sea breeze boundaries or over interior Florida. Otherwise, expect warm temperatures with minimal changes through the weekend.



ARIZONA

Under moderate high pressure, temperatures will see little to no change through the weekend. Afternoon highs will range from 103-108°F in much of southwest Arizona and 107-112°F in southeast California, with morning lows in the upper 70s to mid 80s. Moderate southerly winds will continue. Monsoon moisture will spread across eastern California by Sunday morning, but no measurable precipitation is expected in the southwest counties.

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

Freight Updates



Regional growing deals are wrapping up for the season, while other regions begin to come online, such as Idaho and Eastern Washington. We anticipate with consistently good weather patterns, that we will see stability in the freight market, at least for the time being.



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

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

	07/29/24	08/05/24	08/12/24	Change from	
				week ago	year ago
U.S.	3.768	3.755	3.704	↓ -0.051	↓ -0.674
East Coast (PADD1)	3.844	3.830	3.778	↓ -0.052	↓ -0.624
New England (PADD1A)	4.089	4.073	4.058	↓ -0.015	↓ -0.312
Central Atlantic (PADD1B)	4.028	3.991	3.961	↓ -0.030	↓ -0.538
Lower Atlantic (PADD1C)	3.751	3.742	3.681	↓ -0.061	↓ -0.690
Midwest (PADD2)	3.727	3.729	3.681	↓ -0.048	↓ -0.636
Gulf Coast (PADD3)	3.468	3.436	3.371	↓ -0.065	↓ -0.724
Rocky Mountain (PADD4)	3.718	3.702	3.697	↓ -0.005	↓ -0.697
West Coast (PADD5)	4.370	4.356	4.309	↓ -0.047	↓ -0.777
West Coast less California	3.968	3.951	3.913	↓ -0.038	↓ -0.797
California	4.831	4.821	4.763	↓ -0.058	↓ -0.755

*prices include all taxes

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

Crop Update



Crop assessments continue across the numerous local growing regions following Tropical Storm Debbie last week. Many crops (beans, cucumbers, leafy greens, peppers, tomatoes, squash) have been impacted by this system throughout the numerous states and growing regions impacted. Given the vast growing regions, crop assessments are ongoing, however we expect to see light yields and lingering quality problems as growers harvest upcoming acreage. Fall crops have already been planted in the Southeast region and are set to begin production next month.

Out west growers are seeing the results of the extreme heat throughout Central California this summer. In the San Joaquin Valley these temperatures have caused extensive bloom drops in the melon, tomato and bell pepper fields impacting current yields. Stone fruit and grape production has also seen lower yields and quality due to these temperatures. The long-term effects of this will likely continue to show up into Fall harvests with lower yields and overall smaller sizing in the crops.

In the Salinas Valley cooler temperatures in August, closer to seasonal norms, look to continue into next week helping overall quality in the region. Insect pressure continues to rise and remains problematic throughout the valley with increased reports of flies, aphids and larval worms in the fields. We have also seen an uptick in other pests, reptiles, birds and especially rodents being reported in the fields. This looks to continue this summer as production rolls on.

Cool temperatures and rain in Central Mexico have improved yields and quality in the region as the seed varieties being used are designed for the rainy season during the summer and fall. Green onion supplies from the Mexicali region of Northern Mexico have been impacted by strong winds and thunderstorms impacting yields and quality for the next week or so.

As always upcoming weather patterns will play a crucial role in supplies and quality from the various growing regions across the U.S. and Mexico as we move towards Fall production.



TIM LYNCH

QUALITY ASSURANCE MANAGER