

The Source

Commodity of the Month - Tender Leaf Lettuce



MARKET ALERTS

Avocado: Markets are strong and expected to stay that way for 2-3 weeks, primarily due to Flora Loca. Limited oil content and recent rains are restricting #2 grade fruit availability through August and September. California and Peruvian supplies are decreasing, so flexibility with orders and lead times is essential as availability will depend on current averages.

Blackberries: Supply remains very limited due to heat and rain causing crop losses in Central Mexico and Oregon, with shortages expected to continue until the end of August.

Limes: Rain in Veracruz has led to larger limes peaking at 110/150ct, but smaller sizes are limited. Crossings from McAllen, TX, are lighter, and quality is fair due to rain and humidity causing decay and reduced shelf life.

Lemons: Fruit is peaking at 115ct and larger, with smaller sizes remaining tight until mid to late September. Markets for 140ct and smaller sizes will stay strong, while District 2 (Oxnard/Ventura County) is the main growing region. Offshore imports are also starting to relieve domestic lemon supply issues.

Oranges: Markets are strengthening with school demand, but low harvests are affecting the short Valencia season. Offshore navels are available as alternatives, and the domestic navel crop is expected to start mid to late October, with Valencias at Brix levels around 12.

AUGUST 7, 2024

CROP UPDATES

Tropical Storm Debbie is strengthening off South Carolina's coast, bringing significant rainfall to the northeast. The system is expected to exit the region by Sunday. Agricultural crops, particularly in North Florida and South Georgia, are expected to be severely impacted, with North Florida and South Georgia experiencing the most rainfall. [Read more](#)

WEATHER

Arizona - Arizona is expected to experience rain and flash flooding, with high temperatures expected to reach 110s by Saturday and warmer temperatures this weekend.

California - High pressure weakens by the end of the week, with temperatures remaining near average. Lows range from low 50s to low 60s, with highs in mid-70s to 80s.

Florida - Tropical Storm Debbie is expected to bring heavy rains and flooding to the southeast US, with South Carolina expected to experience flooding and tropical storm force conditions through Friday.

Mexico - Over the weekend, Central Mexico will experience isolated showers, bringing 0.20" of rainfall. Temperatures will remain warm until Aug 11th, with highs in the mid 70s to 80s.

FREIGHT

Pro*Fresh has open truck capacity for both LTL and FTL available this week. Pro*Fresh can build loads, route trucks and manage your shipments to make your life easier!



MARKET ALERTS

Pineapples: Supply is falling short of demand, especially for contracted Costa Rican pineapples, which are seeing lower crossings due to lack of rainfall. New crops are expected in the U.S. during week 32, while Mexican pineapples face quality issues from heavy rains and low Brix levels.

Tomatoes: Tennessee and North Carolina are harvesting, but rain has hurt quality and yields. California supplies are down due to heat, with bloom drop expected in late August. Baja and Central Mexico supplies are light, leading to an active market.

Table of Contents



[Apples](#)



[Citrus \(Lemon\)](#)



[Melon \(Cantaloupe\)](#)



[Asparagus](#)



[Citrus \(Limes\)](#)



[Melon \(Honeydew\)](#)



[Avocados](#)



[Citrus \(Oranges\)](#)



[Melon \(Watermelon\)](#)



[Bell Peppers](#)



[Cucumbers](#)



[Mushroom](#)



[Berries \(Blackberries\)](#)



[Eggplant](#)



[Onions](#)



[Berries \(Blueberries\)](#)



[Garlic](#)



[Pears](#)



[Berries \(Raspberries\)](#)



[Grapes \(Green\)](#)



[Pineapples](#)



[Berries \(Strawberries\)](#)



[Grapes \(Red\)](#)



[Potatoes](#)



[Broccoli](#)



[Green Onions](#)



[Squash](#)



[Brussel Sprouts](#)



[Kale](#)



[Stone Fruit](#)



[Carrots](#)



[Lettuce Iceberg](#)



[Tomatoes](#)



[Cauliflower](#)



[Lettuce Leaf](#)



[Celery](#)



[Lettuce Tender Leaf](#)

Commodity Updates



Apples

New crop Washington apples are starting, with this year's crop projected to be down around 12% from last year. Honey Crisp, Galas, and Granny Smiths will have lower volumes. Early Galas and Ginger Golds begin this week, followed by Honey Crisp later this month. In September, reds, golds, Fujis, and proprietary varieties will start, with Pink Lady apples in October. The 2023 crop had surpluses in Galas and Grannys, but both should see better markets in 2024.

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



Asparagus

There is still good availability of Mexican asparagus being offered from McAllen, TX; Los Angeles, CA; and Salinas, CA, as supply continues to exceed demand. Currently, three main overlapping supply areas are harvesting in Mexico: Southern Baja, Northern Baja, and Central Mexico. However, Jumbo and XL sizes remain very limited. Peruvian asparagus supplies are steady, with the north starting to decrease slightly but new areas in the south opening, which will help maintain production levels.

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



Avocados

ALERT

Markets have risen significantly and are expected to stay strong for the next 2-3 weeks, with Flora Loca as the primary crop. Typically, Flora Loca floods the market, but this year's oil content needs to reach 24% before harvesting, slowing dry matter progression due to recent rains in Mexico. As a result, #2 grade fruit will be limited through August and September. The Negra crop is being shipped inconsistently as that season nears its end. California supplies are dwindling and will last through August, while Peruvian shipments are also decreasing. Flexibility with country origins and size exceptions will be necessary, so please provide as much lead time as possible for orders, as availability will depend on current averages.

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



Bell Peppers

Markets are easing as green bell pepper harvests improve in the Midwest, Northeast, and Canada. Production has also begun in California, particularly in Hollister and Oxnard, as Fresno winds down. Quality from these new areas is excellent. However, red bell pepper supplies remain very short in both California and Canada, and markets are expected to stay elevated through August until new transition areas start producing.

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

This item continues to be in very limited supply across the industry. Heat and rain have caused crop losses in Central Mexico and Oregon. We expect this shortage to persist until the end of August.

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



Berries (Blueberries)

Production in the Pacific Northwest remains heavy, while demand is very light. Mexican production is anticipated to gradually increase over the next few weeks, weather permitting. Advanced production in the PNW is expected to lead to an earlier-than-normal end of the season, potentially causing gaps as we await the first Peruvian imports, expected to arrive in mid to late September.

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



Berries (Raspberries)

We are seeing a good supply of fruit, primarily from the Baja area. Markets have adjusted downward due to light demand.

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



Berries (Strawberries)

Supplies are continuing to decline in the Watsonville and Salinas areas as their season winds down, expected to last through late September or early October, weather permitting. Most pack outs show a lot of full red color. Santa Maria's new crop has begun, but only lightly for some shippers. Others anticipate more substantial numbers by the last week of August.

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

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

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Driscoll's
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Commodity Updates



Broccoli

Broccoli supplies in the Salinas Valley have been slightly lower due to recent heat accelerating field growth. However, yields are expected to improve toward the end of this week and into the next.

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



Brussel Sprouts

Production volumes are improving for the coming week. However, growers are still encountering elongated stems/cores, limiting extra volume for processed packs. Availability of 25lb bulk packs, though, will be much better.

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



Carrots

The Cuyama/Santa Maria area is the primary growing region, expected to continue production until around October. While Jumbos and Cellos are in limited supply, normal business needs are being met. There is ample availability of baby carrots and snack packs, which aligns well with the upcoming school season.

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 expected to be plentiful this week, barring any quality issues from the recent heat. This is 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

Similar to last week, shippers will have all pack sizes available for purchase, with strong availability expected throughout the week. Large sizes will be most abundant in both the northern and southern regions. Shippers are flexible, so take the opportunity to promote this commodity as much as possible. Overall, quality remains good across multiple suppliers.

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

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

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Commodity Updates



Citrus (Lemons)

ALERT

Fruit is currently peaking at 115ct and larger sizes, while 165ct and smaller sizes will remain extremely tight throughout the summer until District 3 begins in mid to late September. Markets for 140ct and smaller sizes are expected to stay strong. With District 1 (San Joaquin Valley) finished, District 2 (Oxnard/Ventura County) is now the primary growing region, focusing on larger fruit. Additionally, offshore imports 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)

ALERT

Ongoing rain in the growing regions of Veracruz has led to larger lime sizes; however, crossings from McAllen, TX, remain lighter. The fruit is currently peaking at 110/150ct, while smaller sizes, such as 230/250ct, are more limited. Quality is fair, as the combination of rain, humidity, and high temperatures has resulted in some issues, including stylar end decay and reduced shelf life.

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



Citrus (Oranges)

ALERT

Markets are strengthening as school demand returns, but harvests remain low, impacting the short Valencia season. Valencias are available in the Central Valley, peaking on 56ct and larger, and in Riverside, peaking on 88ct. Contracts are a priority, with some shippers allocating due to reduced supplies. Offshore navels are available on both coasts as an alternative when Valencias are out of stock. If offshore navels aren't an option, consider switching to apples or grapes. The domestic navel crop is expected to begin mid to late October, with Brix levels on Valencias around 12.

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



Cucumber

Eastern supply is adequate this season, thanks to reduced acreage, with good availability in NY, OH, PA, and MI. Baja and central Mexico are both reporting good volumes, with Baja displaying stronger quality. Additionally, cucumbers from central Mexico are available for loading out of McAllen, TX.

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



Eggplant

Supplies are strong in the East, with several production areas, including MI and NJ. However, eggplant supplies from California have been very tight, as consistent hot weather in the valley has reduced yields and impacted quality.

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

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 by 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)

August is my favorite time for grapes, as California offers the best volumes and new varieties. However, the past month's 110-degree temperatures have taken a toll on both the grapes and harvest crews. Green grapes may show damage and inconsistent quality, while red grapes have seen higher prices, which are likely to hold steady. It's too early to predict the impact on late-season grapes, but a cooling trend could help.

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



Grapes (Red)

August is my favorite time for grapes, as California offers the best volumes and new varieties. However, the past month's 110-degree temperatures have taken a toll on both the grapes and harvest crews. Green grapes may show damage and inconsistent quality, while red grapes have seen higher prices, which are likely to hold steady. It's too early to predict the impact on late-season grapes, but a cooling trend could help.

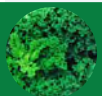
Commodity/Region	Supply	Price	Quality
Mexico (May - June)	Steady	\$\$\$	Good



Green Onions

Due to the extreme heat and humidity in Northern Mexico over the past two weeks, we anticipate reduced harvesting yields, which is likely to lead to a rise in market prices over the next couple of weeks.

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



Kale

Kale supplies are expected to be abundant this week, presenting great opportunities for promotion, and the quality remains excellent.

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

This week, demand has decreased, and shippers have ample product available. Production in the south is moderate, while in the Salinas Valley, multiple shippers are adjusting to accommodate volume-type orders. With schools set to start in two to three weeks, suppliers are aiming to maintain production with competitive pricing. However, expect production to tighten in the coming weeks. Overall quality remains above average.

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

Green leaf supplies have tightened with multiple shippers as the week begins. However, there will be good availability of romaine and red leaf throughout the week, with romaine hearts in all pack sizes also well-stocked. Pricing is expected to be competitive across the industry. Some fringe and tip burn has been observed upon arrival for all leaf items, attributed to the high temperatures experienced in recent weeks.

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

Due to the hot weather in recent weeks, growers are experiencing cilantro going to seed, resulting in reduced yields and quality issues. Expect cilantro supplies to remain tight through next week. Suppliers are proactively shifting to younger fields for harvesting, but this will lead to smaller leaves and shorter heights.

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

The cantaloupe market is steady, with excellent quality from the new crop in Central California. Due to the recent heat wave, the crop is peaking on Jumbo 9s and 9s, while smaller fruit is commanding a premium. Brix levels are in the 14-17 range. Demand is anticipated to rise as school bids and retailers seek to promote summer fruit.

Commodity/Region	Supply	Price	Quality
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Central America (December - May)	High	\$\$\$	Excellent
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Melon (Honeydew)

The honeydew market is steady, with larger sizes in peak supply. Smaller sizes are limited, and Honeydew 8s are commanding a premium.

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 larger sizes in peak supply. Demand has remained steady post-holiday, as retailers actively promote summer fruits.

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

The California and New Mexico seasons are winding down, while Washington and Idaho are ramping up, offering a full range of colors and sizes.

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 are in full production, shipping Red Pears, Bartletts, and Bosc through August and September, with good quality and a firm market. Washington Bartletts and Red Bartletts are expected to start in the third week of August, followed by Bosc in September and Anjou later in the season. Due to frost during bloom, Washington's crop is much smaller this year, particularly in Wenatchee, leading to a high and tight market for Washington pears.

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

New crop Washington potatoes are now available, with limited supplies of early Idaho Norkotahs also entering the market. Storage Burbanks continue to dominate supply, though pressure bruising has become more common in late storages.

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



Squash

Overall, supplies are good with production coming from various regions in the east and west. Yellows are less available than zucchini on the West Coast due to reduced acreage, but quality remains high on both coasts.

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

Harvesting of peaches, plums, and nectarines is restricted to half normal hours due to extreme heat in the Central Valley, negatively impacting fruit quality. Shippers are struggling to meet commitments as pack-outs are lower than usual, likely resulting in shorter peach and nectarine seasons ending in September. Late-season plum varieties should extend their season into November, with early pomegranates starting in mid-August.

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



Tomatoes

ALERT

Tennessee and North Carolina have started harvesting, but rain has caused quality issues and reduced yields. California supplies are down due to heat, leading to increased grading from sun damage, with bloom drop expected around the third week of August. Supply from Baja and Central Mexico is light, so anticipate an active market throughout August.

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

Through the end of the week, high pressure slowly weakens, though temperatures remain near average. Through the week, lows will be in the low 50s to low 60s in the morning. Daytime highs today will range from mid 60s to low 70s near the coast, mid 80s to low 90s in the coastal valleys, and mid 90s to 107 south of Soledad. On Friday, the temperatures will be in the upper 70s to upper 80s in coastal valleys and low 90s to 104 inland.



MEXICO

Throughout the weekend, there will be isolated showers over Central Mexico. Most showers will produce trace amounts to 0.20" of rainfall. Some t-storms may produce higher totals, however. Until Aug 11th, temperatures will remain warm. Maximum temperatures in the mid 70s to mid 80s through Thursday, low 80s to near 90 for Friday and Saturday, and mostly mid 70s to mid 80s on Sunday. The low temperatures will be in the mid 50s to mid 60s through Sunday morning.



FLORIDA

The southeast US will continue to receive prodigious rains from Tropical Storm Debbie. The state of South Carolina is expected to experience flooding and tropical storm force conditions through Friday. By the weekend, heavy rainfall and flooding may reach the Mid-Atlantic states and Southern New England.



ARIZONA

Central and southern Arizona will continue to experience rain Tuesday night and today. There is a possibility of flash flooding along portions of the I-10 and I-8 corridors in southwest Arizona this morning. High temperatures should be closer to seasonable today, warming to the 110s by Saturday. This weekend will be warmer than this week, with morning lows in the 80s-low 90s.

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

Freight Updates



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

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

	07/22/24	07/29/24	08/05/24	Change from	
				week ago	year ago
U.S.	3.779	3.768	3.755	↓ -0.013	↓ -0.484
East Coast (PADD1)	3.872	3.844	3.830	↓ -0.014	↓ -0.418
New England (PADD1A)	4.101	4.089	4.073	↓ -0.016	↓ -0.162
Central Atlantic (PADD1B)	4.061	4.028	3.991	↓ -0.037	↓ -0.404
Lower Atlantic (PADD1C)	3.778	3.751	3.742	↓ -0.009	↓ -0.454
Midwest (PADD2)	3.732	3.727	3.729	↑ 0.002	↓ -0.466
Gulf Coast (PADD3)	3.461	3.468	3.436	↓ -0.032	↓ -0.524
Rocky Mountain (PADD4)	3.731	3.718	3.702	↓ -0.016	↓ -0.586
West Coast (PADD5)	4.394	4.370	4.356	↓ -0.014	↓ -0.555
West Coast less California	3.977	3.968	3.951	↓ -0.017	↓ -0.587
California	4.874	4.831	4.821	↓ -0.010	↓ -0.518

*prices include all taxes

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

Crop Update



Tropical Storm Debbie continues to linger off the coast of South Carolina strengthening slightly over the warm water in the Atlantic. This system is expected to move onshore with the center reaching the coast of South Carolina tonight. Debby should then accelerate toward the northeast on Thursday. This slow-moving system will continue to bring significant rainfall to the northeast over the next few days as it moves through, exiting the region by Sunday. Many crops (beans, cucumbers, peppers, tomatoes, squash) will be impacted by this system throughout the numerous regions as growers begin to assess damage. North Florida and South Georgia were impacted the most with rainfall of 10+ inches recorded. Fall crops were already planted in this region and were set to begin production next month. It will take some time for crop assessments to take place, but it is safe to say extensive damage to multiple commodities is likely following this storm system.



This will increase demand for supplies from California's San Joaquin Valley which has had its share of problems due to the extreme heat in the region in July. These temperatures have caused some bloom drops in the melon, tomato and bell pepper fields. The long-term effects of this will likely show up around late August with lower yields and overall smaller sizing in the crops. Add to this lighter volume from Baja and Mexico due mainly to heat in these regions.



In the Salinas Valley leafy green crops for the most part are showing better overall supplies and quality. Cole crops (Broccoli, Cauliflower, Brussels Sprouts) continue to show the effects of the heat with lingering quality issues in the fields. Insect pressure remains problematic throughout the valley as increased rodent activity is also being reported in the fields. This looks to continue summer production rolls on.



It remains 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 continue to be challenged.

TIM LYNCH
QUALITY ASSURANCE MANAGER