

Weekly Market Review

July 23, 2021

Overview

We continue to keep a close eye on the summer local veg program in the east this week as many regions are seeing pressure due to rain causing issues like quality and harvest delays. We are particularly having issues with tomatoes in the east as transition to new regions limit supply, we are seeing higher markets this week. We do expect this to improve over the next 2 weeks. In the west, we are seeing decent production continue with summer veg and fruit out of California's Central Valley, despite the summer heat wave that has continued to hit the region. We may still see some quality issues and long term affects down the road, but short-term supply is good. Lighter tomato supply expected out of Baja this week and Southern California on Vine Ripes, but quality seems to be improving. We are seeing a tighter bean market mostly weather driven, and limes sizes have begun to make their seasonal sift in size now that the rainy season has begun. We are starting to see larger fruit become readily available and smaller fruit tighten up a bit, but overall good volume and quality continues to cross through Texas.

Market Alert

- Carrots (Jumbo) – **ESCALATED**
- Garlic – **EXTREME**
- Ginger – **EXTREME**
- Pears (Smaller Sizes) – **EXTREME**
- Tomatoes – Grape, Cherry & Rounds, Romas (East) – **ESCALATED**
- Tomatoes – Roma, Grape, Cherry (Mexico) - **ESCALATED**

WATCH LIST

- Apples (Small size Granny Smith)
- Avocados
- Beans - Green
- Bell Pepper Green and Red
- Cucumbers - East
- Corn
- Eggplant
- Mushrooms
- Slicer Cucumber
- Tomatoes West (Rounds)
- Transportation

Transportation

Freight rates continue to impact all concepts resulting from increases on the cost of truck loads, due to the ongoing upsurge in fuel prices in addition to labor with shortage of drivers and warehouse pickers. This is coupled with a large increase cost of pallets, and inflation at an 8-10%. It truly is an unprecedented time in the freight market, so please reach out to your Produce Alliance representative to understand solutions from sourcing outside of produce items, to evaluating pricing moving items from whole to processed on account of labor, and deeper yield per case.

National fuel prices have been jumping daily since January; the national average price per gallon for diesel was \$3.28 per gallon with the east coast averaging \$3.27/gallon and California averaging

\$4.09/gallon. Produce Alliance and its Members are working to negotiate the best freight rates with the most reliable freight companies. We thank you for your partnership as we work through this extremely challenging period facing our industry.

Weather

OXNARD, CA:

Thu 7/22 75° 63°F Partly Cloudy 0 in	Fri 7/23 74° 62°F Mostly Sunny 11 AM 0 in	Sat 7/24 72° 62°F Partly Cloudy 0 in	Sun 7/25 70° 62°F Partly Cloudy 0 in	Mon 7/26 72° 64°F Partly Cloudy 0 in	Tue 7/27 75° 63°F Sunny 0 in	Wed 7/28 74° 63°F Mostly Sunny 0 in	Thu 7/29 73° 63°F Mostly Sunny 0 in
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FRESNO, CA:

Thu 7/22 104° 71°F Sunny 1 AM 0 in	Fri 7/23 104° 72°F Sunny 0 in	Sat 7/24 105° 72°F Mostly Sunny 0 in	Sun 7/25 103° 72°F Partly Cloudy 0 in	Mon 7/26 98° 73°F Partly Cloudy 0 in	Tue 7/27 101° 73°F Partly Cloudy 0 in	Wed 7/28 104° 73°F Sunny 0 in	Thu 7/29 104° 73°F Sunny 0 in
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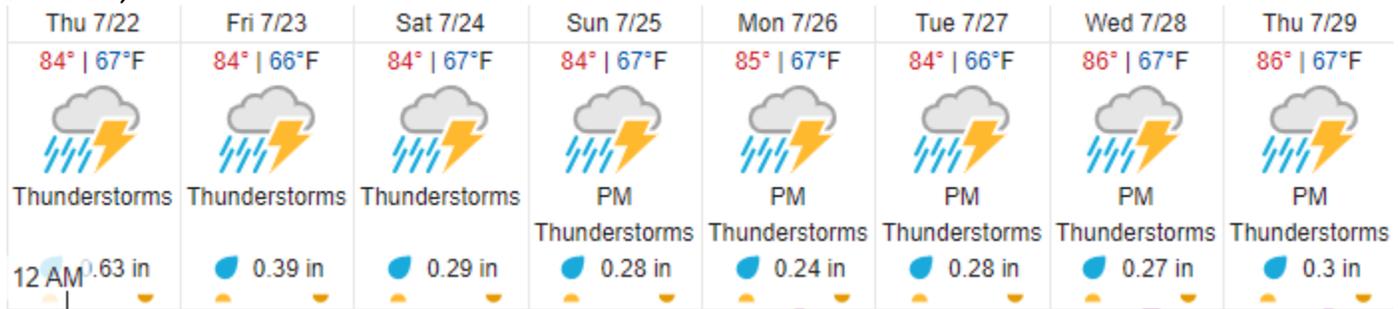
HENDERSONVILLE, NC

Thu 7/22 87° 63°F Mostly Sunny 12 AM 0 in	Fri 7/23 86° 66°F Mostly Sunny 0.03 in	Sat 7/24 83° 65°F Scattered Thunderstorms 0.15 in	Sun 7/25 84° 66°F PM Thunderstorms 0.06 in	Mon 7/26 84° 66°F PM Thunderstorms 0.17 in	Tue 7/27 84° 65°F Scattered Thunderstorms 0.23 in	Wed 7/28 88° 65°F Mostly Sunny 0 in	Thu 7/29 91° 67°F Partly Cloudy 0 in
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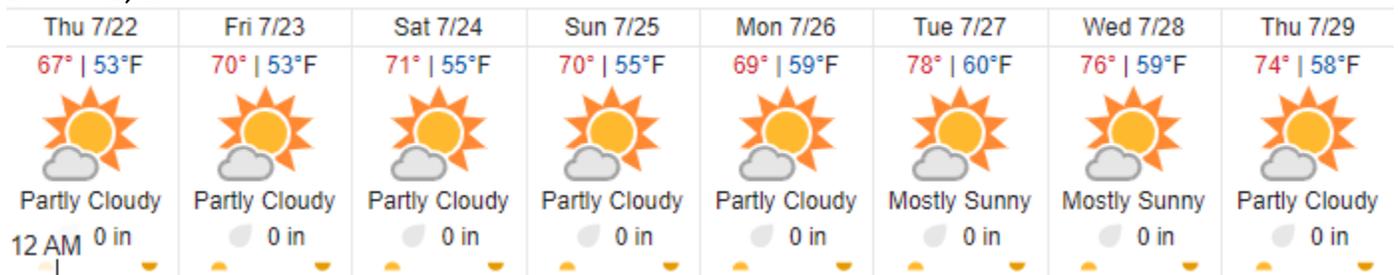
IMMOKALEE, FL

Thu 7/22 95° 74°F PM Thunderstorms 9 AM 0.17 in	Fri 7/23 92° 74°F Scattered Thunderstorms 0.24 in	Sat 7/24 88° 73°F Scattered Thunderstorms 0.33 in	Sun 7/25 89° 72°F Scattered Thunderstorms 0.34 in	Mon 7/26 90° 73°F Scattered Thunderstorms 0.22 in	Tue 7/27 90° 73°F Scattered Thunderstorms 0.17 in	Wed 7/28 91° 73°F PM Thunderstorms 0.12 in	Thu 7/29 92° 73°F PM Thunderstorms 0.11 in
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JALISCO, MX:



SALINAS, CA:



Good Buys

Commodity	Market Update	Produce Expert Tip
Zucchini & Yellow Squash	Strong production now underway out of South Georgia and quality is excellent. In the west we should see Mexico wrap up the season any day with a smooth transition over to the Central Valley and Central Coast starting mid-week. Quality is outstanding.	Zucchini and yellow squash are both versatile and a veg than can absolutely stand on its own. Cut the squash from top to bottom (in half) and score it with a knife... BE CAREFUL! Drizzle it with some oil, salt, and pepper, and place it flesh side down on the grill. This is simple, delicious, and even better cut up and placed in a salad.

Fruits & Vegetables

Avocados: Harvest in Mexico is picking up in overall volume as more orchards can harvest Loca. This Loca volume is projected to double in volume from last week – so improving from ‘extremely limited’ to ‘limited’. As Loca gains more momentum over the next 2 weeks, small fruit will adjust and be more readily available. Currently, the old crop is producing all large sizes, and those are coming to a close – 40s and larger are likely to stay at elevated pricing levels and availability will be scarce.

Bananas: Banana quality and availability are good as we have recovered from the Q4 2020 hurricanes.

Pineapples: Volumes of 6cts are tight but 5s, 7s and 8s are available. Quality is good and supply will be good for the foreseeable future.

Grapes: The grape season, from Mexico, is coming to an end as many growers have finished packing for the season. There will be supply available until inventory is cleaned up, so look for the market to strengthen. Hot weather in the California desert may shorten their season, so look for Coachella to be finished soon. We are seeing good quality out of San Joaquin valley with good supply.

Berries

Strawberries: We expect volumes to remain steady for the next several weeks. The Northern District is observing a return crop with favorable fruit size. Normally this would result in an uptick in supply, however we do see a potential down trend as QA deploys more stringent specs. The Northern District has seen some overripe fruit observed, partially because of growers getting behind on harvests. Santa Maria has reported quality challenges, with the main defects seen in the district of bruising and overripe fruit.

Blueberries: British Columbia is entering their peak this week and we will continue to see peak volumes for the next four weeks. Oregon production will continue with stabilizing volumes for the next few weeks. Washington volumes will continue to increase in the coming weeks. New Jersey volumes will remain low and steady for the next month and a half. British Columbia pack line quality has been good despite heat damage and sunburn from previous weeks, with size being the main call-out from the district. Oregon reported better than expected quality with decent firmness and flavor. Western Washington reported red fruit seen at the docks. Eastern Washington reported size impacts from the recent heatwave, but good quality overall with reduced volume. The Northern District reported good overall quality and good overall flavor. Baja reported good quality as they wind down their season.

Blackberries: Supply will continue low for another 1-2 weeks then ramp up rapidly during the last week of July. Once we enter August, we'll be in full summer peak reaching record volumes for the August period. August will be loaded with blackberries since we'll be in peak production in California and the Pacific Northwest. The Northern District has reported strong quality overall with minimal leaky fruit seen at the docks. Santa Maria has reported good overall quality with no issues to report. Oxnard has reported some quality challenges, but the district is working with local teams to keep close focus on ranches with the bulk of the quality issues. North Carolina and New Jersey have seen some appearance defects of malformed and green as well as some leaky fruit presence.

Raspberries: This is expected to be the last push of volume before we down trend over the next couple of weeks. Overall, volume is expected to remain fairly steady over the next month as the CA regions lead with volume and we transition between applications. Oxnard has reported some presence of wet/leaky fruit. The Northern District continues with peak volumes and growers are staying on top of their harvest intervals driving quality to improve compared to previous weeks. Santa Maria has reported good quality and Baja has seen good quality as volume is increasing.

California

Navels: (late) are still available, mainly larger sizes, 40-72ct. Some shippers are packing navels and valencias, but market price remains high on small fruit. Import navels will be arriving next week from Chile.

Valencias: Market is starting to come down slowly, but still seeing a high market price on small fruit. It is expected to remain this way until navels phase out. Quality is good, size structure is skewed towards the smaller sizes 88-138.

Lemons: Market remains very active on lemons; shippers are holding to averages and many are only covering commitments. Quality issues are common for this time of year, with the pack out about 80% choice grade. Chilean and Mexican imports have started to arrive, which has brought some relief to the market. Our Domestic crop will pick back up again at the end of August.

Limes: Overall market remains stable and a good availability on sizes.

Grapefruit: California grapefruit is available in Riverside & in the Central Valley. Fruit is peaking on the smaller sizes 40, 48, and 56s mostly Fancy Grade.

Imports/Specialties available:

- Import clementines/mandarins are available.

West Coast Lettuce

Butter: Salinas Production volumes are steady this week. Warming daytime temperatures could present some increased occurrence of light burn on this delicate item.

Green Leaf: Salinas green leaf production volumes are tracking slightly higher for the week. Overall quality is nice with a good green color, full heads, and good texture. Demand is steady and pricing is fairly steady.

Red Leaf: Good volume with good quality and the market is steady.

Romaine & Romaine Hearts: Romaine and romaine heart production supplies are steady for the week. Plants are exhibiting good color, texture, and quality overall. We are experiencing some occasional fringe burn at the field level. Overall demand has leveled off a bit while FOB prices remain constant.

Iceberg Lettuce: Lettuce supplies for the next few weeks are projected to be lighter. Supplies industry wide seem to also be lighter due to lower acres planted and quality has been medium. There are a lot of small issues in the field, but the crews will work slowly and make sure the heads look good cosmetically. The markets seem slightly better, and the forecast is for higher prices at the end of the week.

Eastern and Western Vegetables

Green Bell Pepper: **WATCH LIST** Good volume will begin ramping up out of North Carolina and other local regions in Tennessee, and Michigan. In the west, the Central Valley is now in full swing, however supply is tighter this week and we are seeing heat related quality issues continue to lower production yields. We hope to see supply improve over the next 2 to 3 weeks as we transition to newer fields in the coastal regions.

Red Bell Pepper: **WATCH LIST** Supply is tighter this week and markets are up. We continue to recommend booking orders ahead as much as possible to make sure we are keeping good service levels as quality and color continue to be an issue due to heat related pressure. In the east, supply is still good crossing from Canada. We expect shorter markets over the next several weeks.

Yellow Bell Pepper: Lighter supply this week with strong quality available

Mini Sweet Pepper: Excellent supply and quality crossing through Otay Mesa.

Mixed Chili Pepper: **WATCH LIST** Supply has been improving daily on all mixed chilis out of South Georgia and should see stable markets for several weeks. Loading in McAllen there should be no supply or quality issues expected over the next several weeks. Nogales finished crossing early due to heat related quality issues and a hot National Market. California is seeing delays and quality issues due to heat leaving Baja as the sole provider of reliable pepper for the next several weeks until the Central Coast ramps up.

Eggplant: WATCH LIST We are in transition to North Carolina, Michigan, and other local deals. Overall quality is excellent. In the west, the valley is now in full swing with outstanding quality.

Slicer Cucumbers: WATCH LIST Supply is now in full swing out of North Carolina, Michigan, and New Jersey. Cucumbers in the west are coming on stronger this week through Otay Nogales and McAllen. Overall quality is good.

English Cucumbers: Markets increased this week as demand increases due to lower supply on pole cucumbers. Quality remains strong.

Pickles: Markets are tighter this week.

Green Beans: WATCH LIST We are seeing extremely tight numbers in the east this week with Georgia and North Carolina wrapping the season up and transitioning to Tennessee. We do expect to see production from Michigan and New York over the next several weeks barring further weather impacts which could help ease some of these escalated markets back in line. In the west, supply is ramping up out of Fresno and other local regional districts; however, will need to watch quality and supply closely as last week's heatwave may affect supply out of Fresno and Brentwood areas. We should see some additional supply out of the central coast, some light volume available out of Baja.

French Beans: Good volume and there is more interest for French beans as the food service sector continue to open as well as the loss of production in conventional beans. Prices are pushing higher this week and quality is excellent.

Zucchini/Yellow Squash: Strong production now underway out of South Georgia and quality is excellent. In the west we should see Mexico wrap up the season any day with a smooth transition over to the Central Valley and Central Coast starting mid-week. Quality is outstanding.

Herbs

We are seeing very good supply on almost all fresh herbs and flowers at this time and quality is outstanding.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Marginal	USA
Basil	Steady	Steady	USA/ MEXICO
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA
Bay Leaves	Steady	Steady	COL
Chervil	Steady	Marginal	USA
Chives	Steady	Steady	MEXICO
Cilantro	Steady	Steady	USA
Dill	Steady	Steady	USA/MEXICO

Epazote	Steady	Steady	MEXICO
Lemongrass	Steady	Steady	USA
Marjoram	Flowering		USA
Mint	Steady	Steady	USA
Oregano	Flowering		USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA
Savory	Limited	Steady	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	USA
Thyme	Steady	Steady	USA/MEXICO
Lemon Thyme	Steady	Steady	USA
Lavender	Limited		USA
Lime Leaves	Steady	Steady	USA

Melons

Cantaloupe: Strong production has continued over the past week with very sizable national retail promotions materializing this week. The amount of volume being moved is expected to quickly stabilize the cantaloupe market at slightly higher levels. Current production has shifted to primarily 9s and larger with a decent percentage of 12s to satisfy all contract needs, no 15s have been packed. Quality has been at optimal levels with solid external and internal characteristics.

Honeydew: Honeydew production continues with minimal numbers. There does not appear to be any immediate relief in sight especially with current production providing sizing that is mostly 5/5Js with very few 6/8s being harvested. Flexibility of sizing may be required at time of loading in the short term as we are shipping dews day of harvest.

Watermelon: Markets firmed up this week with strong demand out of Florida, Georgia, and Alabama. Texas is also seeing more demand than normal. Logistics continues to be a challenge in all markets and sizing is peaking on 60's this week. We are also seeing volume ramp up out of the central valley on bins and minis. Quality in the west is very nice.

Mixed Vegetables

Artichokes: Volume is low this week, we expect to harvest only 4 days. Quality is excellent, we're packing Andy Boy label. We expect volume to remain low into the month of August and prices are higher on some sizes.

Arugula: Supply and quality are good.

Asparagus: Market is steady. **Peru:** Good volume, quality, and demand. **Mexico:** Central Mexico supplies are expecting to increase after mid-July.

Bok Choy: Supplies are expected to be plentiful for the next three weeks. Now is an opportunity for promotion!

Broccoli/Broccoli Florets: We will be right at budget this week on Broccoli. Supplies will be very manageable as we have seen growth slowed from cooler than expected weather. Quality is very nice throughout due to this controlled growth as well.

Brussels Sprouts: Sprout volume is expected to drop slightly for the coming 7-14 days. Yields are dropping as a result of increased insect injury and some discoloration. The open market has softened slightly but is expected to level out and remain steady due to lighter volume.

Carrots: **ESCALATED** Quality is good, still seeing limited supply on jumbos and very limited on snack packs out of California as Jumbos are still not sizing up. Jumbo Carrots available to load in Arizona.

Cauliflower: Supplies are steady, market is slightly stronger. Overall quality and appearance should be very nice.

Celery: Business is average this week with good supplies for us and in the industry. Quality is good and the market is lower in Salinas. We are fully transitioned to Salinas.

Corn: **WATCH LIST** We are seeing volume get snug out of South Georgia. In the west, we have steady supply available, however, we need to watch the conditions closely due to last week's heatwave that could affect quality over the next several weeks. We are also seeing curtailed harvesting due to shortages of labor.

Cilantro: Cilantro supplies are expected to be on the lighter side again this week as we continue to experience some issues with bacterial spotting and seeder which seems to be the case throughout the Salinas Valley.

Fennel: Lower volume this week. Quality is strong overall.

Garlic: **EXTREME** New crop California garlic is getting ready to get started but we will still be shipping product of Mexico for another 1 to 2 weeks until California starts. Quality from Mexico still looks good, and we are anticipating very good quality from California when the new crop starts. Market remains extreme.

Ginger: **EXTREME** Ginger is very volatile due to very inconsistent supply and market is higher. Supply remains tight for the foreseeable future.

Green Cabbage: Supplies are steady. Quality remains consistent with sizing and overall appearance. Now is a great time to promote with additional availability!

Green Onions: Supplies and quality are good this week.

Jicama: Steady supply available crossing through McAllen.

Kale (Green): Bunched kale supplies are expected to be plentiful for the next few weeks. Now is a good opportunity for promoting product.

Mushrooms: **WATCH LIST** We are seeing an overall stable market however there going to be potential shortages of button sized mushrooms as labor costs and a shortage of labor continue to impact the mushroom industry nationwide. These shortages are forcing growers to make economic decisions that produce the best yield per man hour, the smaller mushrooms tend to produce the lowest yields per man-hour.

Napa: Supplies are expected to be plentiful for the next three weeks and now is an opportunity for promotion.

Parsley (Curly, Italian): Parsley supplies are expected to be plentiful for the next three weeks. Now is an opportunity to promote!

Rapini: Good supplies on rabe and should have extra product to sell for the week. We are harvesting every day this week and should have product available each day. Quality is strong overall.

Red Cabbage: Supplies are steady with good quality.

Snow Peas: Quality is good. Guatemala has good volume and Peru volume is light but will be increasing Mid-July.

Sugar Snap Peas: Quality is good. Guatemala has good volume and Peru volume is light but will be increasing Mid-July.

Spinach (Bunched): Cool foggy mornings are causing some mildew and warmer afternoons are causing insect presence.

Spinach (Baby): Supply and quality are good.

Spring Mix: Supply and quality are good.

Sweet Potatoes and Yams: New crop harvest starts as soon as next week for some sweet potato growers. We are looking at new crop shipments starting in about 6 weeks after they cure. Last year's crop is starting to dwindle, and inventory is getting tight, but supply should hold to avoid gap.

Onions:

The market on yellows, reds, and whites remains steady out of both California and New Mexico. While the extreme heat in California and frequent rain in New Mexico have taken their toll this summer, quality remains strong overall. The onions are sound, and still plenty 'hard,' they just may have the occasional staining and at times, some inconsistencies in sizing. At this point, we are not expecting to see any drastic increases or decreases for the remainder of the summer until the Northwest starts in the next several

weeks. There are still plenty of onions to move out of California, so it is possible we see a decent period of overlap with California and the Northwest – which could negatively impact FOB prices during harvest. Northwest growers are continuing to express great concern for the upcoming crop due to record high temperatures in Idaho/Oregon/Washington. While we have seen heat waves like this in the past, it rarely arrives this early in the season at this level of intensity. The plants have not grown enough to form a protective canopy and causing challenges in keeping up with the necessary irrigation requirements. The belief is that both yields and sizing may be negatively impacted. Freight continues to be challenging out of all onion growing regions. Finding the right truck and rate seems to be as much about timing and finding ‘one-off’ deals in comparison to what most carriers are commanding. There remains hope that we will see some temporary relief in the coming weeks as summer holidays will be done until Labor Day. Jumbo red and white onions out of southern New Mexico are escalated.

Potatoes:

The potato market continues to move upward due to increased demand for foodservice and dwindling storage supplies of Burbanks left in Idaho. We are beginning to see more growers drop out each week, and this trend will continue through August. While larger size cartons had previously been much more limited than smaller potatoes, we are now seeing small size potatoes significantly tighten up as well. Quality is about what you would expect for this time of year in Idaho. There will be signs of age on the crop, with some rots packing out worse than others. Processor demand has also remained elevated and is expected to continue as well, which has kept off grade and #2 product cleaned up. The Rupert area growers will start new crop first as they do every year. We anticipate this to take place during week of August 8th. Each week, we will see more growers finish their old crop, and then shut down for a short period for maintenance, before starting into new crop Norkotahs. For the last several years there has been a big overlap between old crop Burbanks and new crop Norkotahs. However, this year we expect there will be more of a gap between old and new, which should make for a tight supply situation in August and elevated FOBs. Idaho and Washington potato growers are expressing great concern for the upcoming crop due to record high temperatures in the region. While we have seen heat waves like this in the past, it rarely arrives this early in the season at this level of intensity. The plants have not grown enough to form a protective canopy and causing challenges in keeping up with the necessary irrigation requirements. The belief is that both yields and sizing may be negatively impacted. The concern surrounding trucks continues to be a challenge. There remains hope that we will see some temporary relief in the coming weeks as summer holidays will be done until Labor Day. As harvest begins in August, supply will be coming out of the fields fast and in large quantities. Historically, trucks generally ‘flock’ to this region for loads as there is no shortage of available product to ship since the initial potatoes being dug cannot be stored and must ship. If the truck supply does not improve this year, we may see added challenges this year during harvest.

TOMATOES

East Coast

- **Rounds: ESCALATED** Production in the east continues to interrupt by rain in all regions from Tennessee to North Carolina. We are seeing some slight issues with quality and self-life as well but hope to turn the corner over the next couple of weeks. We are not expecting any shortages or pro-rates this latest escalation.
- **Romas: ESCALATED** East Coast Roma production will continue to be lighter than expected through the next week. We should see a vast improvement on quality and volume once we start the mountain deals over the next 10-14 days. We are currently maintaining service level and do not expect shortages or pro-rates at this time.

- **Grape Tomatoes: ESCALATED** We seem to be stalled in transition on snacking tomatoes but should start seeing some volume out of North Carolina and Tennessee over the next week followed by Virginia. Currently, we are not anticipating any pro-rates or shorts on our contracts.
- **Cherry Tomatoes: ESCALATED** We seem to be stalled in transition on snacking tomatoes but should start seeing some volume out of North Carolina and Tennessee over the next week followed by Virginia. Currently, we are not anticipating any pro-rates or shorts on our contracts.
- **Organic Tomatoes: WATCH LIST** Supply very limited, and quality is marginal.

Mexico

- **Round Tomatoes: WATCH LIST** Markets have ticked up once again due to lighter production and we are struggling with color and volume due to heavy cloud cover and rain in Central Mexico and will need to watch this closely. Volume on the Baja is slow to ramp up. Quality overall is very nice, good availability on all sizes.
- **Roma Tomatoes: ESCALATED** Volume remains slow to ramp up out of some regions in Central Mexico due to rain and ongoing cloud cover. Quality has been fair and should begin to improve over the next week as weather and volume improve. On the Baja, volume will improve daily crossing through Otay and quality is outstanding on all sizes.
- **Grape Tomatoes: ESCALATED** Mexico continues to struggle with volume, particularly out of Central Mexico due to lack of sun however we are seeing numbers begin to improve. We do anticipate better number crossing through Otay over the next week as well. Currently, we do not anticipate any shortages or pro-rates on contracts despite ongoing strong demand and escalated pricing.
- **Cherry Tomatoes: ESCALATED** Supply remains light this this week out of Mexico and quality is mixed.

California

- **Romas and Rounds: WATCH LIST** We continue growers harvesting daily round and roma tomatoes out of the Central Valley. Volume has been improving daily, however, due to last week's heat we do expect to see some compromised quality on newer picks. We will certainly expect some shelf life and appearance issues as we continue into the harvest over the next few weeks. Good supply available on South San Diego County Vine Ripe Rounds and Romas.

APPLES & PEARS

Apples: WATCH LIST Granny smith apples remain tight, especially on the smaller sizes. East coast growers will have minimal availability through May. Import apples will start arriving at the end of this month on the east coast.

Pears: EXTREME ON SMALL SIZES Small pears will remain tight through August. Imports are available on the east coast.

Peaches: Yellow and white flesh available out of California and yellow flesh available out of South Carolina.

Nectarines: Yellow and white flesh are available out of California

Cherries: Good supply available out of California, however, will need to watch how the PNW crop reacts to the latest heatwave to hit Washington State.

Kiwi Fruit: Steady supply available on both coasts. Californian and Italian Hayward's are available.

