

# Weekly Market Review

July 30, 2021

## Overview

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Local veg programs on both coasts remain a challenge due to weather pressure from heat in the west to continuous rain in the east. In the east, we are seeing growers continue to struggle with tomatoes, cucumbers, and squash and do not expect quality to improve for several weeks.

## Market Alert

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

## Watch List

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- Apples (Small size Granny Smith)
- Avocados
- Beans - Green
- Cucumbers - East
- Limes
- Slicer Cucumber
- Squash
- Tomatoes West (Rounds)
- Transportation

## Transportation

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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. The national average price per gallon for diesel is \$3.34 per gallon and we are looking at a \$3.15 national average rate per mile for a reefer truck. 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.

As we continue to return to normal activities travel and entertainment the uptick in spend has more than offset the negative growth for durable goods by 300%. In an average year, we would expect June spot rates to peak above May levels, and although this was not the case this year, we saw rates follow a normal seasonal pattern leading up to early July. The challenges that carriers are facing with driver and truck availability will continue to limit availability of capacity to support pickups and there continues to be a vast amount of uncertainty as to when to expect true deflationary market conditions.

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.

## Weather

### OXNARD, CA:

Thu 7/29	Fri 7/30	Sat 7/31	Sun 8/1	Mon 8/2	Tue 8/3	Wed 8/4	Thu 8/5
72°   62°F	72°   62°F	72°   61°F	72°   59°F	72°   59°F	72°   61°F	74°   62°F	74°   62°F
Mostly Sunny	Partly Cloudy	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny
0 in	0 in	0 in	0 in	0 in	0 in	0 in	0 in

### FRESNO, CA:

Thu 7/29	Fri 7/30	Sat 7/31	Sun 8/1	Mon 8/2	Tue 8/3	Wed 8/4	Thu 8/5
104°   78°F	105°   77°F	100°   74°F	103°   70°F	101°   67°F	101°   68°F	103°   68°F	103°   70°F
Mostly Sunny	Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny
12 AM 0 in	0 in	0 in	0 in	0 in	0 in	0 in	0 in

### HENDERSONVILLE, NC

Thu 7/29	Fri 7/30	Sat 7/31	Sun 8/1	Mon 8/2	Tue 8/3	Wed 8/4	Thu 8/5
104°   78°F	105°   77°F	100°   74°F	103°   70°F	101°   67°F	101°   68°F	103°   68°F	103°   70°F
Mostly Sunny	Mostly Sunny	Partly Cloudy	Sunny	Sunny	Sunny	Sunny	Sunny
12 AM 0 in	0 in	0 in	0 in	0 in	0 in	0 in	0 in

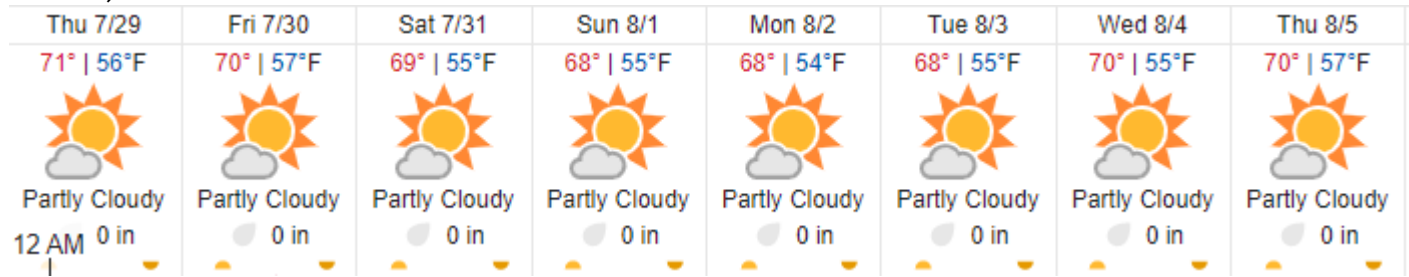
### IMMOKALEE, FL

Thu 7/29	Fri 7/30	Sat 7/31	Sun 8/1	Mon 8/2	Tue 8/3	Wed 8/4	Thu 8/5
90°   73°F	93°   75°F	93°   75°F	92°   75°F	92°   75°F	91°   75°F	92°   74°F	91°   74°F
PM	PM	PM	PM	Scattered	Scattered	PM	PM
Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms
12 AM 0.07 in	0.24 in	0.09 in	0.09 in	0.19 in	0.14 in	0.3 in	0.15 in

### JALISCO, MX:

Thu 7/29	Fri 7/30	Sat 7/31	Sun 8/1	Mon 8/2	Tue 8/3	Wed 8/4	Thu 8/5
85°   67°F	86°   67°F	85°   67°F	83°   67°F	82°   66°F	81°   66°F	80°   65°F	82°   66°F
PM	PM	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms
Thunderstorms	Thunderstorms						
12 AM 0.42 in	0.49 in	0.38 in	0.46 in	0.53 in	0.57 in	0.46 in	0.47 in

**SALINAS, CA:**



**Good Buys**

Commodity	Market Update	Produce Expert Tip
<b>French Beans</b>	Good volume and there 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.	French beans and peppers are a classically delicious duo! Trim the beans, and remove the seeds and membrane from the peppers, then slice thinly. Cook both the beans and peppers in boiling water until they are tender and crisp! Then, give them an ice bath while you head some oil in a pan. Once the vegetables are cooled, add them to the pan with the oil and sprinkle some salt, pepper, and red pepper flakes on town. When they are almost done add some fresh garlic, thyme and zest from a lemon. Enjoy!
<b>Red Bell Pepper</b>	Supply is stable, and quality is better this week however 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 while stable crossings continue from Mexico.	

**Fruits & Vegetables**

**Avocados:** Expectations are for a mostly steady market this week. Harvest levels of Loca are now surpassing the old crop and currently there is enough volume available of all sizes. The old crop will likely end in a few days and then large sizes: 40s and up, will become short. The size curve shift will be more noticeable next week as fruit that is harvested now makes its way across the border. There are no supply issues with #2s or organics. The final weekly harvest numbers are not in yet, but Mexico is expected to surpass its estimated volumes again - by about 10 million pounds for 2 weeks in a row. With all 3 countries of origin the total arrivals to the US are expected to come in around 60 MIL Lbs. (which is a number that supports a steady market).

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

**Pineapples:** Pineapple volume continues to be lower due to the natural flowering process. The quality is good with no expected shorts for our contract customers who can switch between sizes.

**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:** Overall, we expect volumes to remain steady with a gradual downward trend. Santa Maria volume is reducing as growers are removing acres as they focus on fruit quality. We expect a slight increase in Watsonville and

Salinas as we are observing a return crop in one of our varieties. Warmer weather is expected to start next Tuesday, which may trigger an uptick in volume. The Northern District has noted positive trends this week due to the region focusing on the decay presence seen at the docks caused by the misty mornings. The district said that the return crop has had good sized fruit, which should help maintain basket counts going forward. Santa Maria has reported 10% of the district acreage has been removed from production due to quality.

**Blueberries:** British Columbia is in their peak this week and we will continue to see peak volumes for the next four weeks. Oregon production will continue with stabilizing and strong 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. New Jersey blueberries have had good quality with big sized fruit. The district is reporting good flavor and size. There has been some minor leaky fruit because of rains from the weekend. The Northern District continues with minimal volume with good flavor across the district.

**Blackberries:** Supply is expected to increase week over week for the next 2-3 weeks. The increases will be substantial and we expect to reach peak volumes during mid and late August. We will be producing from all USA regions during August. Once we enter the September period, we will begin descending in supply gradually. The Northern District reported good overall quality in terms of both condition and flavor. Oxnard is working with growers to maintain quality where there are challenges. North Carolina has reported good to fair quality and the season is expected to end in the next couple of weeks. New Jersey quality has been fair because of getting behind on harvesting.

**Raspberries:** Volume is officially down trending and will continue to do so over the next two weeks. This is our low point for the summer and fall season, as all CA regions transition between staggered producing acres. Looking ahead to mid-August, we should pick up as new plantings across the regions increase. The Northern District has reported a slight downtrend in volume because of some applications and as a result, growers are able to stay on top of their harvests. Santa Maria has reported good overall quality with small amounts of condition defects because of growers maintaining harvest intervals. Oxnard has reported dropping acreage where quality is a concern.

### **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:** **WATCH LIST** 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**

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**Butter:** Salinas production volumes are steady this week. Demand and FOB pricing is flat.

**Green Leaf:** Salinas green leaf production volume is steady. Overall quality is nice with a good green color, full heads, and good texture. Demand is fairly steady, and pricing is firming up a bit.

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

**Romaine & Romaine Hearts:** Production supplies are beginning a slight downward trend. We are experiencing some quality issues at the field level ultimately reducing yields. Plants that are healthy are exhibiting good color, texture, and quality overall. We will continue to be subject to occasional fringe burn. Overall demand has been steady, but with yields reducing, be prepared for advancement in the marketplace.

**Iceberg Lettuce:** Lettuce supplies and higher demand are the forecast for this week. Yields are lower due to both weather and lower acreage. Quality is medium and there are more issues being reported for the week but nothing that the crews cannot clean up. The market started to get active at the end of last week and seems like it will continue this week. Anticipate higher prices due to lighter volumes.

### **Eastern and Western Vegetables**

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**Green Bell Pepper:** 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, and we are starting to see some intercoastal valley shippers begin to scratch as well, there is larger sized fruit available this week. Overall quality will begin to improve as these newer areas ramp up production.

**Red Bell Pepper:** Supply is stable, and quality is better this week, however, we continue to recommend booking orders ahead of time 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 while stable crossings continue from Mexico.

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

**Mini Sweet Pepper:** Lighter supply and diminished quality this week. We are seeing shorter shelf life on these due to heat.

**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:** Good supply available out of New Jersey and upper Midwest as well as 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:** **ESCALTED** Markets continue to firm up as supply continues to be light crossing from Canada and Mexico. We are also seeing very light supply out of California. Quality remains strong.

**Pickles:** Markets are tighter this week.

**Green Beans:** **WATCH LIST** We continue to see light numbers in the east out of the Northeast this week mostly due to rain delays and quality impacts. In the west, supply remains steady out of Fresno and other local districts. There is light supply also available out of Baja. Overall quality is fair.

**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:** **WATCH LIST** The east is seeing shorter supply in all of the local regions mostly due to rain and this will affect quality over the next several days. 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:** As projected, cantaloupe production has decreased over the past seven days from its peak levels and combined with very good retail movement has left the overall market in a stronger position. New fields are peaking

on gct melon with a good percentage of 12s also being harvested. Higher than normal temperatures are forecasted in the region over the next three days which could accelerate some production into the near-term. Current harvests are of optimum quality with excellent shell color and high brix levels.

**Honeydew:** Honeydew production remain very light overall with sizing mostly 5s and larger leaving 6/8s in a limited position most days. Many growers have scaled back on their honeydew allotment this year mainly due to the lower water allocations. These decisions have led to a significant decrease in daily availability and there does not appear to be any relief in sight for the record pricing levels.

**Watermelon:** Supply available out of the Midwest, South Carolina, North Carolina, Kentucky, and Indiana. We are also seeing some light volume out of the Mid Atlantic. Good volume out of California and Texas; logistics continues to be a challenge in all markets. Quality in the west is very nice.

### **Mixed Vegetables**

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**Artichokes:** Quality is excellent, volume continues to be light. 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 and quality with steady demand. **Mexico:** Central Mexico supplies continue light with fair quality

**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:** Plan to see another week of light sprout volume driven by low yields from quality challenges - light decay and discoloration are still noted. The VA Category will also be hard hit again this week especially on the halved sprout SKUs. There has been a recent surge in internal decay and severe discoloration that has prevented production. There should be a slight volume improvement this week, but we won't see a return to normal volume numbers for at least 7-14 days.

**Carrots:** We are still struggling with jumbos and table due to labor (these are hand pack item). No constrains on any peeled carrots, food service items (except for sticks which is made from jumbos). Schools are starting to start back so we need all projections on snack packs sent in ASAP!

**Cauliflower:** Cauliflower supplies should remain good for the coming week. The market remains generally steady to slightly stronger with good demand. Some light spotting and discoloration are noted.

**Celery:** Business is average this week with good supplies in the industry. Quality is good and the market is steady in Salinas.

**Corn: Corn:** We are seeing good volume out of the northeast as well as the west. Quality is good.

**Cilantro:** Cilantro supplies are expected to be tight and 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:** We will see light supplies on fennel this week. We continue to go into plantings early as our Salinas fields continue to see coastal cooling temps in the mornings/nights and product is not moving forward. We will see limited to no 18ct this week – majority of our sizing will be 30ct. We will work to cover normal weekly business only.

**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, and 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:** Supply and quality continue to remain stable.

**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:**

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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:**

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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 8<sup>th</sup>. 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**

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### **East Coast**

- **Rounds: ESCALATED** Production in the east continues to interrupt by rain in all regions from Alabama, Tennessee to North Carolina. We are seeing issues with quality and shelf-life as well but hope to turn the corner over the next couple of weeks. We do recommend cutting back on inventory and increasing turns to improve quality and limit shrink as we navigate through this current crop cycle. Fortunately, 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 2 to 3 weeks. We do recommend cutting back on inventory and increasing turns to improve quality and limit shrink as we navigate through this current crop cycle. Fortunately, we are not expecting any shortages or pro-rates this latest escalation.

- **Grape Tomatoes: ESCALATED** We seem to be stalled in transition on snacking tomatoes, but are seeing light volume out of North Carolina, Virginia, and Tennessee. Currently, we are not anticipating any pro-rates or shorts on our contracts. We are expecting light volume for at least another 1-2 weeks.
- **Cherry Tomatoes: ESCALATED** We seem to be stalled in transition on snacking tomatoes, but are seeing light volume out of North Carolina, Virginia, and Tennessee. Currently, we are not anticipating any pro-rates or shorts on our contracts. We are expecting light volume for at least another 1-2 weeks.
- **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: WATCHLIST** 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, New Jersey and NE Atlantic.

**Nectarines:** Yellow and white flesh are available out of California

**Cherries:** Stable supply available out of Washington.

**Kiwi Fruit:** Steady supply available on both coasts. Californian and Italian Haywards are available.