

# Weekly Market Review

September 10, 2021

## Overview

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The avocado market continues to struggle on large sized fruit out of California and Mexico; Pricing is escalated, and large sized fruit is extreme. We ask that you be flexible on sizing this week and/or sub over to Peruvian fruit to maintain service levels. Fortunately, we expect to see some relief in late September. We are seeing better numbers on dry veg out of the intercoastal valley regions and moving away from the central valley. We are seeing improved production on tomatoes out of Central Mexico this week including grape tomatoes, whereas cherry tomatoes will most likely remain snug for the rest of the year. In the east, we are seeing tighter numbers on round tomatoes and escalated markets mainly due to the ongoing struggle with weather related pressure from several rain events that have affected quality in the east (items immediately impacted are corn, pumpkins, and cucumbers). We will continue to observe areas hit by flooding in the northeast and do expect severe crop losses as growers close the season and harvesting begins to move south to Georgia and South Carolina for the fall.

## Market Alert

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- Avocados – **ESCALATED**
- (**Extreme** on large sized fruit)
- Asparagus - **ESCALATED**
- Brussel Sprouts – **ESCALATED**
- Carrots (Jumbo) – **ESCALATED**
- Chili Pepper (Serrano) – **ESCALATED**
- Cucumbers - **ESCALATED**
- Green Onions - **EXTREME**
- Garlic – **EXTREME**
- Ginger – **EXTREME**
- Limes – **ESCALATED**
- Napa Cabbage - **ESCALATED**
- Pears (Smaller Sizes) – **EXTREME**
- Tomatoes – Rounds (East) & Cherry (East & Mexico) – **ESCALATED**

## WATCH LIST

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- Apples (Small size Granny Smith)
- Green Beans
- Strawberries
- Pickles
- Tomatoes East (Rounds and Romas)
- 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 9/9	Fri 9/10	Sat 9/11	Sun 9/12	Mon 9/13	Tue 9/14	Wed 9/15	Thu 9/16
75°   61°F	75°   62°F	75°   60°F	73°   58°F	73°   57°F	71°   57°F	69°   58°F	68°   58°F
Partly Cloudy 12 AM 0 in	Sunny 0 in	Mostly Sunny 0 in					

### FRESNO, CA:

Thu 9/9	Fri 9/10	Sat 9/11	Sun 9/12	Mon 9/13	Tue 9/14	Wed 9/15	Thu 9/16
104°   72°F	97°   68°F	98°   65°F	98°   64°F	97°   64°F	98°   63°F	98°   61°F	94°   62°F
Mostly Sunny 1 AM 0 in	Sunny 0 in						

### HENDERSONVILLE, NC

Thu 9/9	Fri 9/10	Sat 9/11	Sun 9/12	Mon 9/13	Tue 9/14	Wed 9/15	Thu 9/16
77°   54°F	77°   53°F	77°   53°F	83°   58°F	86°   60°F	84°   61°F	82°   62°F	79°   62°F
Mostly Sunny 12 AM 0 in	Sunny 0 in	Mostly Sunny 0 in	Sunny 0 in	Sunny 0 in	Mostly Sunny 0 in	Mostly Sunny 0 in	Scattered Thunderstorms 0.2 in

### HUDSONVILLE, MI

Thu 9/9	Fri 9/10	Sat 9/11	Sun 9/12	Mon 9/13	Tue 9/14	Wed 9/15	Thu 9/16
73°   50°F	77°   60°F	86°   66°F	84°   58°F	83°   66°F	86°   64°F	76°   57°F	82°   62°F
Partly Cloudy 3 AM 0 in	Partly Cloudy 0 in	Mostly Sunny 0 in	Mostly Cloudy 0 in	Partly Cloudy 0 in	Mostly Cloudy 0.27 in	Scattered Thunderstorms 0.36 in	AM Showers 0.05 in

### JALISCO, MX:

Thu 9/9	Fri 9/10	Sat 9/11	Sun 9/12	Mon 9/13	Tue 9/14	Wed 9/15	Thu 9/16
82°   66°F	83°   67°F	88°   65°F	87°   66°F	81°   65°F	75°   64°F	79°   65°F	79°   65°F
Thunderstorms 4 AM 0.27 in	Mostly Cloudy 0 in	Mostly Sunny 0 in	Isolated Thunderstorms 0.12 in	Thunderstorms 0.83 in	Thunderstorms 0.5 in	Thunderstorms 0.25 in	Thunderstorms 0.24 in

### SALINAS, CA:

Thu 9/9	Fri 9/10	Sat 9/11	Sun 9/12	Mon 9/13	Tue 9/14	Wed 9/15	Thu 9/16
73°   59°F	72°   56°F	70°   55°F	72°   56°F	72°   55°F	76°   54°F	71°   55°F	70°   54°F
Partly Cloudy 8 AM 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in	Partly Cloudy 0 in	Sunny 0 in	Sunny 0 in	Sunny 0 in

## Good Buys

Commodity	Market Update	Produce Expert Tip
<b>Grape Tomato Medley - Mexico</b>	Excellent volume and quality crossing through McAllen	Grape tomatoes medley is the PERFECT mix roast! A medley is colorful and full of a variety of different tomato flavors. Place them in a pan or cast-iron skillet with a heavy drizzle of olive oil, salt, pepper, and rosemary. Then, roast until medley are starting to soften. This is great on bread, a beautiful way to top pasta, or just to eat by itself as a side dish

## Fruits & Vegetables

**Avocados: ESCALATED** As we continue to monitor avocado market, we are seeing costs rise due to supply winding down out of California and Peru. At the same time, Mexico is transition from the Flor Loca crop to the Avenejada crop. As predicted, being the current crop was already down by over 30 percent, we will continue to see a rapid decline of large fruit and do not expect the size curve to improve for at least another 3 to 4 weeks. When we initially discussed this condition, we predicted Labor Day as the target date for a sign of improvement. However, currently, with several days of heavy precipitation with two tropical systems impacting the regions, there have been further delays for an additional two weeks. We are hoping the rain delay will help size up fruit on the front end of the crop and stabilize the markets evening out the size distribution. Having said that, our contracts have been performing quite well through these challenging times and we have collaborated with our grower partners, our end user partners to make the necessary adjustments to sizes and growing regions where necessary to maintain service level.

**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:** Several new varieties of Red Seedless are now in production: Krissy, Magenta, and Scarlett Royal. Market remains steady at current market prices. Look for the Red Seedless market to come more in line with the Green Seedless market as volume of Scarlett Royals, the next major Red Seedless variety, comes into full production in the northern part of the San Joaquin Valley.

## Berries

**Strawberries:** Due to warmer temperatures, we are observing increased production this week. Growers are reporting an improvement in fruit size and improved fruit quality, due to the cool temperatures which preceded the recent heat event. We expect favorable volumes the next couple of weeks. The Northern District continues to be challenged in coastal ranches with condition defects, but it has improved compared to last week. The region has reported that growers have been more attentive to bruised and overripe fruit. Santa Maria summer planting has had good firm fruit with good flavor. Winter plant has seen sporadic soft and slightly smaller fruit.

**Blueberries:** British Columbia is past its peak, and we will continue to see volumes drop off every week for the next 2 weeks. Oregon production will continue with decreasing volumes for the next 3 weeks. Washington volumes will continue for a few more weeks. Mexico production began last month with light volume and will continue to increase each week moving forward. Baja production has begun and will slowly ramp up over the next few weeks. The Northern District continues with light volume with high flavored fruit. Baja has seen good size with low basket counts and good flavor.

**Blackberries:** Hot temperatures during the backend of last week is leading to a fruit flush during the first half of the week. The additional supply will be short lived, and we expect the volumes to descend on the back half. The Pacific Northwest will conclude its season during the next 2-3 weeks. The rest of the regions will continue descending week over week. Most of the surface area is past peak production with only a portion still peaking and for a majority we expect a gradual downtrend going forward. We expect central Mexico to begin the season in October. The Northern District has reported good overall quality with good size and flavor. Santa Maria has seen good overall quality with a slight increase in soft fruit isolated to certain applications. Oxnard has seen good quality overall and Quebec has reported good overall quality with medium to large sized fruit with good size and appearance.

**Raspberries:** Volume continues lower than previously expected this week and has been adjusted down for all of September. We are expecting to increase as we head towards the end of September, with Central Mexico volume leading the way. We anticipate the Central Mexico regions to peak in late October/early November. A few more weeks left in the Canadian regions and two more weeks until the CMEX regions take off. Santa Maria has seen a slight increase in condition percentage due to warmer temperatures at the end of last week. The Northern District has reported some softer fruit in the Watsonville area, partially due to humid nights. Oxnard has reported good appearance with good color, Quebec has seen small to medium sized fruit with decent flavor, and Baja has seen good sized fruit.

## **California Citrus**

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**Navels:** DONE.

**Valencias:** Market seems to be coming down a bit on small fruit. Sizes still peaking 88/72, quality has been good.

**Lemons:** The lemon market is beginning to come down as our domestic crop ramps up. Imports are still available from Argentina, Chile, and Mexico. Quality coming in on the east coast seems to be a little spotty, and fruit shape can be a little less desirable.

**Limes:** **ESCALATED** Market is stabilizing after the hurricane. Pricing in the high teens, quality has still been spotty.

**Grapefruit:** California grapefruit is available in Riverside. Fruit is peaking on 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 Lettuce:** Supply is expected to be plentiful this week. Now is an opportunity for promotion!

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

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

**Romaine & Romaine Hearts:** Romaine and romaine heart production supply is beginning to trend below budget. 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 and lighter weights. Overall demand is steady, with slightly better moment on hearts.

**Iceberg Lettuce:** Supply is slightly lower than normal with yields and pounds per acre being the main reason. Quality overall is good but there continues to be a lot of small issues at the field level. Crews are doing a good job of cleaning up the pack and weights will continue to be lower than normal. The market is active due to lighter supplies and better overall demand.

### **Eastern and Western Vegetables**

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**Green Bell Pepper:** Product is ramping back up of North Carolina should see stable numbers over the next week but do expect lighter numbers out of the far Northeast due to heavy rain. We continue to see steady production out of other local programs in Michigan and other local regions. In the west, the Central Valley production is mostly done, and we are now seeing excellent production out of the intercoastal valleys with steady volume expected through Labor Day. Quality is outstanding in the newer regions.

**Red Bell Pepper:** Supply is stable, and excellent quality out of our grower in California. In the east, supply may struggle as we may see issues this weekend with Hurricane Grace and lighter harvest numbers out of Canada.

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

**Mini Sweet Pepper:** Stable supply available this week and quality is good.

**Mixed Chili Pepper (Serrano Peppers) ESCALATED** We are seeing some local deals continue in the east with stable supply. In McAllen, we are seeing lighter supply due to rain from Hurricane Grace. Serranos are particularly tight and escalated. We need to keep a close eye on this as more reports of damage and loss come in from growers across central Mexico where some regions saw up to 1 foot of rain. We are not seeing any supply issues on contracts at this point, because we have worked with our growers to navigate through this but will continue to monitor. We also need to keep in mind that quality will be an issue as we are still dealing with older plantings in some regions and any further weather pressure may know the crops out completely. On the west coast, there is supply crossing from Baja but lighter this week as well. California continues to produce good numbers and price is mixed depending on quality.

**Eggplant: WATCH LIST** We will see supply tighten out of New Jersey and the rest of the northeast and quality is fair. In the west, the valley is seeing some heat related issues related due to last month's heat wave. We expect better supply next week as they break newer blocks and the desert start back up in two weeks with Nogales on the horizon.

**Slicer Cucumbers: ESCALATED** We are seeing lighter supply out of all regions this week and supply is snug. We are starting to see cooler nights in Michigan and North Carolina, fortunately we should be transitioning to South Georgia over the next ten days. Cucumbers in the west are lighter this week crossing through Otay, Nogales, and McAllen. Overall quality is good in the west, but in the east, we will see weather related quality issues.

**English Cucumbers: Market and supply are good, and quality is outstanding. Good crossings from Canada and Mexico.**

**Pickles: WATCH LIST** The Market is steady, but will be lighter this week out of Michigan, we should start seeing transition back to the south and Mexico over the next several weeks as the summer local season comes to a close.

**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:** Volume remains stable, and quality is strong.

**Zucchini/Yellow Squash:** We are starting to see supply ramp back up out of North Carolina this week and will see delays in New Jersey due to weather. The upper Midwest will continue for a few more weeks and will see squash out of South Georgia over the weekend become available. Quality is mixed in the east, and in the west, good supply continues out of Santa Maria and Baja. Quality is good on green and marginal on yellow. We should start to see new crop squash cross through Nogales in 3 weeks!

### **Herbs**

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

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	USA/ MEXICO
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA
Bay Leaves	Steady	Steady	COL
Chervil	Steady	Steady	USA
Chives	Steady	Steady	MEXICO
Cilantro	Steady	Steady	USA
Lemongrass	Steady	Steady	USA
Marjoram	Heat	Very Limited	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA
Savory	Heat	Very Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	USA

Thyme	Steady	Steady	USA/MEXICO
Lemon Thyme	Heat	Very Limited	USA
Lavender	Heat	Very Limited	
Lime Leaves	Steady	Steady	USA

## Melons

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**Cantaloupe:** The cantaloupe market remains at higher levels continuing its record pace for the domestic melon season. As we move deeper into the month of September, the California region will be experiencing less daylight as well as slightly cooler temperatures which will translate into a shift of sizing to a more 9/12/15s profile and away from jumbo fruit. Overall quality remains strong as we break a new field this week and brix levels have consistently been in the 12-14% range.

**Honeydew:** As we have been forecasting, the honeydew situation continues to worsen, and we do not anticipate any relief for the balance of the California season which will go into early to mid-October. With less honeydews being intentionally planted, because of the severe water restrictions in California we are now fully realizing the fallout from this decision making. Flexibility of sizing may be required at time of loading as we anticipate shortfall in honeydew production over the next 4-6 weeks at minimum.

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

## Mixed Vegetables

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**Artichokes:** Volume continues to be low this week, we expect to harvest only 3 days. Prices are higher, quality is excellent, and we expect volume to remain low through the month of September

**Arugula:** Supply and quality are good this week.

**Asparagus:** **ESCALATED** Market is higher on asparagus as supply is very light out of Mexico and just moderate out of Peru. Market will stay firm going into next week

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

**Broccoli/Broccoli Florets:** Supply is lighter, and the market is improving.

**Brussels Sprouts:** **ESCALATED** Volume on sprouts look to be picking up in the next few weeks. Demand remains strong and quality is excellent. There is some occasional insect injury and elongated seed stem are noted but overall color and condition are excellent.

**Carrots:** **ESCALATED** Shippers 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).

**Cauliflower:** Supply is expected to be plentiful this week. Overall quality and appearance should be very nice and the market is slightly stronger.

**Celery:** Business is better this week with good supply. Quality is good and the market is better in Salinas.

**Corn:** **WATCH LIST** Corn supply is mixed by region due to weather. In the west valley corn is tight due to heat, New York and Michigan corn are in good supply with but quality is mixed.

**Cilantro:** Cilantro supply is expected to be plentiful this week. Now is a good opportunity for promotion!

**Fennel:** We will continue to see good supply on fennel this week, sizing and quality are excellent with sizing running mostly 18's and 24's. Good volume will continue through at least next week.

**Garlic:** **EXTREME** Garlic contracts have now fully transitioned to new crop California, although supply is still light, and 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:** Supply is steady, and quality remains consistent with sizing and overall appearance.

**Green Onions:** **EXTREME** Supply and quality are good this week. Market is extremely active due to supply shortage with many growers in northern Mexico because of the extremely hot weather and high humidity the past two months.

**Jicama:** Steady supply available crossing through McAllen.

**Kale (Green):** Bunched kale supply is expected to be plentiful for the next few weeks.

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

**Napa Cabbage:** **ESCALATED** Supply is going to be light for the front part of the week as sizing is a little on the smaller side in our upcoming plantings. Volume should improve midweek, but we are forecasted for lighter numbers for the next two weeks.

**Parsley (Curly, Italian):** Parsley supply is expected to be plentiful for the next three weeks.

**Rapini:** We will have good supply on Rabe this week. We should have extra product available to sell each day. Quality remains strong overall and we are forecasted to have good supply or the next couple weeks.

**Red Cabbage:** Supply is steady with good quality.

**Snow Peas: Guatemala:** Good volume and good/fair quality, with low demand. **Peru:** Good volume, and low/steady demand with good quality.

**Sugar Snap Peas: Guatemala:** Good volume and good/fair quality, with low demand. **Peru:** Good volume, and low/steady demand with good quality.

**Spinach (Bunched):** Quality concerns are tip and wind burn. Insect pressure, aphids, and mildew are also an issue due to foggy mornings.

**Spinach (Baby):** Supply and quality are good this week.

**Spring Mix:** Quality concerns now are tip burn and wind burn.

**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 Northwest continues to ship a smaller size profile, with Colossal and Super Colossals being limited. Typically, the onion market is seeing a reduction in price during harvest. This season, given the slow start for a lot of growers, in addition to poor size and yields, we are seeing the market increase on all colors and sizes, outside of medium yellows. This is an unprecedented situation and is indicative of the crop this season in the Northwest. We should see jumbo yellows normalize in the coming weeks when growers are full steam ahead, however, the typical influx of supply that pressures pricing down may not occur this season. Additionally, there are still New Mexico and California onions being put onto the market as well in certain parts of the country. As those supply areas dry up, the demand pressure on the Northwest should increase as well. Northwest growers are continuing to express great concern for the long-term health and supply of this year's crop due to both wind and heat events during the growing season this Summer. Record high temperatures in Idaho/Oregon/Washington are already negatively impacting yields in the early fields. The situation should be somewhat clarified as growers continue to get into new fields as well and realize just what type of supply they have on hand. Labor is also presenting some major challenges and limiting production out of both Idaho/Oregon and Washington. Once we get past the first of the year, supply is expected to further tighten, and if the heat has detrimental effects on the onions long term storage ability, we may see elevated levels of shrink. 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. A lot of freight analysts are predicting some relief sometime in 2022. At this point, we are not hopeful of it taking place any sooner as we will be approaching the holiday season soon.

### **Potatoes:**

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The potato market has reached a plateau for the time being as newer crop Norkotah growers continue to enter the market. We should begin to see some pricing relief as early as next week, however, pricing remaining as high as it is during this time is a good indicator of how short the overall crop may be. While yields on early fields have been extremely poor, we are beginning to see some better size profiles on larger size count cartons. The concern regarding as much as 30% or more of the crop remain alive and well, however, we likely will not feel just how tight the market is until we get to around Spring and Norkotahs begin to wind down. Once we get to the later part of the crop, and are shipping Burbanks exclusively, size is going to be a real challenge. Unfortunately, we are not in a situation where we can make up the Idaho shortfall with supply from other growing regions, as Washington experienced similar growing conditions, and they are up against the same challenges related to low yields. The concern surrounding trucks continues to be a challenge. While there is more available equipment than there was several months ago, rates continue to remain elevated. Both shippers and receivers should be prepared to continue to see elevated freight rates at least through this calendar year. In normal circumstances, we see a drop in rates during the first quarter, but it remains to be seen if that will take place this coming year.

## TOMATOES

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### East Coast

- **Rounds: ESCALATED** We are seeing a lot of smaller fruit out there and overall lighter inventories this week as we are starting to see a gradual winding down of the summer production out of the mountain regions in preparation for the move to the Carolinas and eventually back to Florida. We still have several weeks, but with the fair quality due to the weather production will certainly be lighter until newer blocks ramp up. We are working closely with our growers to keep you informed of any issues or supply shortfalls we may see over the next two to three weeks until we transition back to South Carolina and Florida.
- **Romas: WATCH LIST** We are seeing a lot of smaller fruit out there but still a fair distribution if sizes available. Quality is fair and will need to watch for issues over the next several weeks as well due to continued rainfall. We are working closely with our growers to keep you informed of any issues or supply shortfalls we may see over the next several weeks.
- **Grape Tomatoes:** We will see a mix on volume and quality over the next several weeks mainly due to the weather for the entire snacking tomato category. We will continue to observe and evaluate the condition and health of the crop with our growers for a sign of improvement but expect light volume through the remainder of the summer programs.
- **Cherry Tomatoes: ESCALATED** We will see a mix on volume and quality over the next several weeks mainly due to the weather for the entire snacking tomato category. We will continue to observe and evaluate the condition and health of the crop with our growers for a sign of improvement but expect light volume through the remainder of the summer programs.
- **Organic Tomatoes: WATCH LIST** Supply very limited, and quality is marginal.

### Mexico

- **Round Tomatoes:** Markets remain mixed this week despite a bit more volume crossing through Otay and McAllen. Overall quality is very nice on rounds.
- **Roma Tomatoes:** Lighter crossings this week on romas and quality has been fair and should begin to improve over the next week as weather and volume improve. On the Baja, volume is lighter this week and may be short crossing through Otay. Quality is outstanding on all sizes.
- **Grape Tomatoes:** Better volume and good quality crossing through all major borders this week.
- **Cherry Tomatoes: ESCALATED** Supply remains light this this week out of Mexico and quality is mixed.
- **Grape Tomato Medley:** Excellent volume and quality crossing through McAllen

### California

- **Romas and Rounds: WATCH LIST** We continue to see growers harvesting daily round and roma tomatoes out of the Northern California and quality can vary by region. We are seeing some quality issues on vine ripens out of Southern California this week, mainly caused by heat related pressure. We are working with the grower to clean this up but going to struggle for a few more weeks.

## APPLES & PEARS

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**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, 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.