

# Weekly Market Review

## September 6, 2024

### Overview

Supplies are lighter this week on local corn, bell peppers, hot peppers, squash, and cucumbers. East coast berries and stone fruit are wrapping up while beans continue to be stable. Fall items such as sweet potatoes and pumpkins are expected to be available this week. Tomato markets are still volatile with rounds lighter this week and plenty of romas available. Current table grape supply and demand out of California is strong. Pineapples continue to be short, and shippers are asking to be flexible on sizing to navigate the shortfalls. In the west, tighter supply is available to market on mushrooms. Weather impacts and viral pressure have caused supply shortfalls across the region on all varieties; they are hoping this will improve over the next six weeks. Limes are extremely short as well with marginal quality until the new growing areas get started sometime at the beginning of Q4. The avocado Loca crop continues to favor 60s and smaller, and the USDA is reporting more than a \$20 spread between 48s and 60s. Larger fruit and #2s will be in very tight supply for 4-6 weeks. It is recommended that programs be sized down where possible for the best cost. Late September is looking more favorable as there will be plenty of overlap between Flora Loca and Aventajada crops to supply the U.S. with Mexican avocados during the fall. Q4 is expected to bring strong volumes on all sizes, with plentiful promotional opportunities to carry us into the new year. Weather in the Salinas Valley is still warmer than usual. The Brussels sprout market is no longer extreme but is still escalated. Supplies have improved a lot, and we should see the market continue to come down. The triggers should come off very soon. Endives, escarole, leeks, cilantro and fennel are still escalated but are trending down with supplies improving. Green onions are still at the extreme trigger. They are extremely tight and are suffering from the weather in the growing regions. Expect these to stay escalated for at least a few more weeks. Cilantro is also very tight. You can expect to see growers holding to averages on cilantro and green onions. Cauliflower is no longer at an extreme trigger but is still escalated. Quality is okay but supplies are still tight with some growers still holding to averages. Artichokes are also at the extreme trigger. The supplies are very tight and will be that way for the next few weeks. Growers are holding to averages. Broccoli is still escalated but is trending down and should be off triggered pricing soon. Spinach is not escalated yet, but it is on the watchlist due to tight supplies. Some growers are prorating. Excessive heat in the San Joaquin Valley citrus growing areas have heavily affected supplies on the Valencia orange crop with another heatwave forecasted for the end of this week. Most shippers are reporting probable "Gaps" in production of up to 2 to 3 weeks or more between the end of the Valencia crop and the beginning of the Navel season.

### Alert









- Asparagus – **ESCALATED**
- Artichokes – **EXTREME ON SOME SIZES**
- Avocados – **ESCALATED**
- Bell Pepper (Red, Yellow, Orange) – **ESCALATED**
- Blueberries – **EXTREME**
- Bok Choy – **ESCALATED**
- Broccoli Florets and Crowns – **ESCALATED**
- Brussel Sprouts – **ESCALATED**
- Carrots – **ESCALATED**
- Cabbage, Red – **ESCALATED**
- Cauliflower – **ESCALATED**
- Cilantro – **ESCALATED**
- Endive and Escarole – **ESCALATED**
- Fennel, Anise – **ESCALATED**
- Green Onions – **EXTREME**
- Hot Peppers (Red Fresno and Serrano) – **ESCALATED**
- Leeks – **ESCALATED**
- Limes – **EXTREME**
- Mushrooms – **ESCALATED**
- Napa – **ESCALATED**
- Lemons – **EXTREME ON SMALL SIZES**
- Parsley (Curly & Italian) – **ESCALATED**
- Pineapple – **ESCALATED**
- Tomatoes (Rounds) – **ESCALATED**

### Watch List









- Corn
- Eggplant
- French Beans
- Ginger
- Lettuce Iceberg Liner
- Lettuce Romaine and VA Blends
- Lettuce Green Leaf and Red Leaf
- Melon - Honeydew
- Oranges
- Snow Peas & Sugar Snap Peas
- Spinach

### Weather









#### SALINAS, CA

Thu 9/5	Fri 9/6	Sat 9/7	Sun 9/8	Mon 9/9	Tue 9/10	Wed 9/11	Thu 9/12
78°   56°F	79°   56°F	73°   55°F	72°   56°F	70°   55°F	69°   55°F	72°   55°F	74°   56°F
							
AM Fog/PM	AM Fog/PM	Partly Cloudy	Partly Cloudy	Partly Cloudy	AM Clouds/PM	Partly Cloudy	Partly Cloudy









#### OXNARD, CA

Thu 9/5	Fri 9/6	Sat 9/7	Sun 9/8	Mon 9/9	Tue 9/10	Wed 9/11	Thu 9/12
84°   64°F	85°   66°F	85°   68°F	85°   67°F	80°   63°F	75°   62°F	74°   61°F	74°   61°F
							
Sunny	Sunny	Partly Cloudy	Partly Cloudy	Sunny	Partly Cloudy	Sunny	Sunny









**BAKERSFIELD, CA**

Thu 9/5	Fri 9/6	Sat 9/7	Sun 9/8	Mon 9/9	Tue 9/10	Wed 9/11	Thu 9/12
105°   75°F	106°   76°F	104°   75°F	103°   74°F	103°   72°F	99°   69°F	95°   67°F	94°   68°F
							
Sunny	Mostly Sunny	Mostly Sunny	Sunny	Sunny	Sunny	Sunny	Sunny









**JALISCO, NAYARIT**

Thu 9/5	Fri 9/6	Sat 9/7	Sun 9/8	Mon 9/9	Tue 9/10	Wed 9/11	Thu 9/12
83°   67°F	82°   67°F	86°   67°F	86°   68°F	86°   67°F	84°   67°F	82°   67°F	80°   67°F
							
PM	PM	PM	PM	PM	Scattered	Thunderstorms	Thunderstorms
Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms	Thunderstorms		

**SAN QUINTIN, BAJA**

Thu 9/5	Fri 9/6	Sat 9/7	Sun 9/8	Mon 9/9	Tue 9/10	Wed 9/11	Thu 9/12
82°   67°F	85°   69°F	90°   72°F	88°   71°F	87°   71°F	86°   68°F	81°   67°F	80°   66°F
							
AM Fog/PM	Mostly Sunny	Partly Cloudy	Mostly Sunny	Mostly Sunny	Sunny	Sunny	Partly Cloudy

**HENDERSONVILLE, NC**

Thu 9/5	Fri 9/6	Sat 9/7	Sun 9/8	Mon 9/9	Tue 9/10	Wed 9/11	Thu 9/12
75°   55°F	75°   59°F	77°   55°F	72°   51°F	77°   52°F	78°   54°F	77°   56°F	74°   58°F
							
Partly Cloudy	Mostly Cloudy	Partly Cloudy	Partly Cloudy	Sunny	Mostly Sunny	Partly Cloudy	Showers

**Fruits & Vegetables**

**Avocados: ESCALATED** Last week closed at 53.2M pounds across all COO's. Peru is concluding as expected – a quick decline. Meanwhile, California's exit from their season is more leisurely. The Loca harvest is strong in Mexico, and plenty of orchards are now available for harvest. Peru's volumes were under 3M pounds last week, and most programs have ended. The same week last year brought 10.6M pounds from Peru to the U.S. The season is now showing negative growth compared to last year. The total crop is estimated to bring 153M pounds to the U.S. this season. California saw 9.3M pounds come off the trees last week, and while the season is slowing, the numbers continue to impress. The northern region has produced far more than estimated, and being so far ahead of the budget, CAC has been reevaluating the crop estimate process. The pre-season estimate for 2025 is likely to include more grower input, and most are already calling for another large crop year. Overall, dry matter is averaging 26%.

**Bananas:** Steady supply and quality remain good across the country.

**Pineapples: ESCALATED** Supply was lighter this week and quality remains good. Sizing is going to be a challenge over the next few weeks, and we may need to be flexible on sizing as 5-6ct fruit is very short with 7-8's plentiful. The need to be flexible on sizing may be necessary to maintain consistent supply.

**Table Grapes:** Excellent supply will be available out of California this week. Quality out of California is mostly good as the crops are taking the heat wave better than expected. We are getting concerned the end of the season could fall short due to crop loss.

**Berries**

**Strawberries:** Overall volumes saw a decline and markets are more active as we move into the fall season. Volumes are expected to see a more significant decline in late September. Daytime temps in the Salinas/Watsonville area are in the high 60s to low 70s and nighttime temps in the mid-50s. Production has been steady, though overall output volume is decreasing week-over-week as we get further into the Fall. Growers are seeing issues of darker, soft, and overripe fruit and mildew due to the foggy mornings. Labor is very tight; ranches are doing their best to keep up with harvest schedules. Santa Maria weather has been cool in the mornings and warm in the afternoon this week, with highs in the low 80s and overnight lows in the low 50s. Fall Crop has continued to see good, strong fruit as the season continues to pick up every week. Plants are loaded with flowers, so we are expecting large numbers to be produced during the peak. All FC acres are in a consistent harvest schedule and will be cycling some nice fruit and entering a peak in the middle of September to early October. Most blocks show good shape and firmness with crooked tips and light bronzing around. Overall appearance looks decent, and crews are working hard to sort through small, crooked, bronzed, and soft fruit. Seeing some minor bruising in the pack, but nothing too concerning. No labor issues in Santa Maria.

**Blackberries:** Overall volumes are lighter due to the issues out of Mexico. Quality is decent out of Mexico, with sizing between the medium to large range, good sheen, mostly black, and with good firmness. Due to high temperatures in the regions, growers do see red cell regression in some ranches and soft, leaking fruit as the days continue to be hot. Rain has caused some concern for instances of mildew. Blackberries' volume has passed its peak and will steadily decline throughout August until we pick back up in early October. Watsonville Blackberries look good, have medium-to-large sizing, and have great flavor. Attached calyx and red cell regression is a minor occurrence and are seeing some issues with smaller fruit. Overall, production is strong and currently in our peak for blackberries in Watsonville. Fruit is testing high in brix as well. We are expecting continually strong production through August and early September.

**Raspberries:** Volume for raspberries stays at a steady low through August until we pick back up in September. Mexico's rainy season is starting to end, with rain coming more sporadically and less intensely, but it is still here. The weather has been hot and humid, with temperatures in the high 70s to low 80s and nights in the low 60s. Overall, the fruit looks decent with a decent red color, with some fruit lighter in color in the pack due to picking a bit early ahead of the heat. Growers do see some overripe, crumbled fruit and mildew from the high moisture environment from the rainy season, but crews are doing their best to keep them out of the packs. Watsonville Raspberries' production has sharply declined and will finish within the next few weeks. Overall, the color is a nice dark red color due to the warm temperatures underneath the hoops, and the sizing of the rasps is a good medium size on average. Very little availability.

**Blueberries: EXTREME** The industry is currently experiencing a situation where demand surpasses supply due to a notable shortfall in blueberry production. This condition is anticipated to persist until imports from Peru and Central Mexico begin to arrive in the U.S. markets, with significant volumes expected in early to mid-November. Additionally, mid to late October is projected to witness the lowest overall volumes. In the Pacific Northwest, fresh production is concluding, as late-season high temperatures and rainfall have posed challenges, resulting in lower yields and compromised quality, including issues such as softness, shriveling, and mold. The "storage" blueberries, which were preserved in modified atmosphere containers to extend the season into September, are now exhibiting signs of early deterioration, and their quality does not meet the standards for fresh market packing, leading to a diversion of product to processing. Other domestic regions are also facing similar challenges; for instance, Michigan has experienced multiple rain events late in the season, yielding comparable results.

## Citrus

**Oranges: WATCHLIST** The California Valencia orange crop is experiencing challenges with quality and supplies. Heavy Thrip pressure during the growing period, followed by extreme heat during the summer, has significantly affected the quality of fruit, leaving a high percentage of fruit unsuitable for shipping. Due to these conditions, many growers/shippers are reporting lighter than normal supplies for the balance of the California Valencia season. Most shippers have curtailed harvesting, covering regular business only. Even with curtailed harvesting, many shippers are still having to prorate orders. Expect a "GAP" in production between the end of the Valencia season and the beginning of the Navel season, possibly up to 2 to 3 weeks.

**Lemons: EXTREME ON SMALL SIZES** Light supplies continue in California and will continue light until new crop District 3 Lemons get started towards the end of September. Import lemons are arriving with small fruit available. Supplies on lemons from Mexico continue to be very light as drought conditions have affected available fruit to pick. Flexibility on sizing and loading days/areas will be mandatory to get orders filled on orders loading in California!

**Limes: EXTREME** The market has increased significantly as supplies continue to decline. In addition, extreme weather conditions in Mexico from high temperatures and humidity have affected quality, with all fruit showing light coloring and excess skin breakdown. We expect to see defects continue through September with little to no improvement before the end of September or beginning of October. Due to the increasingly short supplies, shippers are doing all they can to cover orders but "Please Expect Prorates" to orders as we work through the next couple of weeks.

**Grapefruit: WATCHLIST** We continue to see significant changes in grapefruit from California, primarily due to the record heat through the summer. Look for record low pack outs and anticipate a gap in production until the Desert crop gets started in late October.

**Imports/Specialties:** Import lemons, oranges are arriving and mandarins are available.

### West Coast Lettuce

**Iceberg: WATCHLIST** Lettuce supplies are light this week. Growers should be able to cover all contract business but the open market volume will be limited. We are entering the fall season, and crops will begin to see yields decline. Quality looks very good

**Iceberg VA:** Quality and supply looks good. Demand has increased.

**Romaine, & Romaine Hearts: WATCHLIST** Romaine, and romaine heart supplies are good. Growers do expect yields to start dropping with fall approaching. Quality looks very good.

**Green Leaf and Red Leaf WATCHLIST:** Production in the Salinas Valley is steady. Overall quality is very good with good movement. Supplies have decreased a bit, so we are going to leave this one on the watch list.

**Butter:** Production in Salinas Valley is steady. Overall, the quality is good.

### Eastern and Western Vegetables

**Green Bell Pepper:** Better supply this week out of Michigan, the Carolinas and West Coast as we get into the last summer regions of the season. Good supply on choice peppers with larger sizes drawing a premium. Overall quality is good.

**Color Bell Pepper: ESCALATED** Improving volume on red and yellow Pepper this week. Supply out of Canada is stable; orange pepper availability was lighter this week. Markets are still holding firm, and the quality is good.

**Mini Sweet Pepper:** Supply will be hit and miss this week loading in California.

**Mixed Chili Pepper: ESCALATED** Supplies in general are good across most varieties out of Mexico and California. In the east, we could see gaps on hot pepper based on the track of Tropical Storm Debby. The shortest items this week are Fresno and Serrano Peppers.

**Eggplant: WATCHLIST** Tighter supply from all domestic growing regions is putting upward pressure on price and there are very limited crossings available in Nogales and McAllen. We suspect markets will be hit and miss now through the fall transition in late October.

**Slicer Cucumbers:** Supply will be lighter this week crossing through Otay and McAllen. Domestically some of the local regions are scratching such as Tennessee and Michigan. Overall, the quality is good, but markets will be higher.

**English Cucumbers:** Light supply and good quality will be available this week. FOB prices were higher this week.

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

**Green Beans:** Supply remains light this week and quality is hit or miss due to weather-related pressure.

**French Beans: WATCHLIST** Production continues to improve out of Guatemala. Supply out of the west remains fair with good quality.

**Zucchini/Yellow Squash:** Supply has tightened up in the east, particularly on yellow, while supply in the west is stable. Quality is good.

### Herbs

Good supply and quality on all herbs, except for dill, albeit improved, which is being affected by weather in Mexico, Peru and Colombia. Chervil production continues to be low.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Marginal	USA
Basil	Steady	Steady	USA/MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL

Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Steady	USA/MEX
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Steady	Steady	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

### **Melons**

**Cantaloupe:** We are starting to see Fall growing conditions as a decline in yields has started and has impacted the entire category from price to sizing where we are peaking on 12's. Weather patterns in the growing region over the past two weeks have peaked in the low 100s and dropping to highs in the low 80s. This stopping and going is stunting the growth of the melons. Cantaloupe production may begin to stabilize next week if fields are able to catch up, with sizing estimates still unknown. In the meantime, current harvests are showing excellent quality still with nice straw color. Brix levels are mostly in the 12-14% range.

**Honeydew: WATCHLIST** Honeydew production has started to improve with a decent spread of sizing (5/6s) seen over the past few days this week rather than exclusively jumbo fruit as was reported last week. Overall availability remains limited, which is keeping the markets firm, but we can finally, confidently, cover all contractual commitments this week. Honeydew quality has been clean, strong and brix levels remain at mostly 12-14% levels.

**Golden Honeydew:** Supply available out of California.

**Watermelon:** Stable supply available and demand is light. Fruit is being harvested from a number of regions: Virginia, Maryland, California, Michigan, Texas as well as Mexico.

California Mixed Melon production will continue through mid-October with Yuma set to begin at that time and hope for seamless transition to the fall crop.

### **Mixed Vegetables**

**Artichokes: EXTREME ON SOME SIZES** Supplies are very tight and will remain that way for at least the next 2 weeks. The market is at the extreme trigger on the 12-24ct. Growers are holding to averages. Quality is good.

**Arugula:** Supplies and quality are both good.

**Asparagus: ESCALATED** Southern/Northern Baja production has remained the same this week, still heavy on smaller sizes. The Central region continues to wrap up their production due to seasonality. Peruvian volume continues to improve, but mostly with smaller sizing. Southern Peru has started to harvest. We should see better production within the next two to three weeks. Markets continue to be less active on smalls and standards, more active on large, XL and jumbo.

**Bok Choy: ESCALATED** Quality is good but supplies are still limited. The light supplies will keep the market escalated.

**Broccoli/Broccoli Crowns: ESCALATED** Quality and supplies continue to improve but some growers are still seeing lighter supplies. That is keeping the market slightly escalated.

**Broccolini and Sweet Baby Broccoli:** Quality and supplies are good.

**Brussels Sprouts: ESCALATED** The outlook for supplies is improving. The market is still escalated but is no longer extreme and is trending down as volume is increasing. Quality is good. We should see more relief as supplies improve.

**Carrots: (JUMBOS, MEDIUMS and CELLOS):** Steady supplies continue with good Quality. Supplies from Mexico are improving.

**Cauliflower: ESCALATED** Quality and supplies are improving. The market is no longer at the extreme trigger but is still triggered. Some growers will be holding to averages, but supplies are improving.

**Celery:** Quality and Supplies are okay. There are some heat issues and insect pressures.

**Cilantro: ESCALATED** The market is active and supplies are very tight. High demand has continued. Growers should be able to cover normal volumes.

**Corn: WATCHLIST** Supply is hit or miss in the east due to transitional gaps and poor quality due to insect pressure. In the west, supply was lighter this week and they are dealing with quality issues. Markets remain firm this week.

**Fennel: ESCALATED** The fields are seeing lower yields and therefore there is a shortage in supply. Pricing will stay escalated until supplies improve.

**Garlic:** New crop California Garlic has started. The quality is very good with very good demand.

**Ginger:** Supplies and market are steady

**Green Cabbage:** Supplies are steady with very good Quality. Demand is good.

**Green Onions: EXTREME** Due to the extreme heat we have seen over the past few weeks, the supplies have gotten very short on green onions. Prices remain escalated, and many growers will be holding to averages. Supplies are very tight.

**Mushrooms: ESCALATED** Supply was lighter this week, particularly on cremini's. In the west growers from Canada to California are dealing with supply shortfalls across the entire category due to weather impacts as well as virus pressure. We expect to see improved availability in approximately six weeks.

**Napa Cabbage: ESCALATED** Quality and supplies are improving.

**Parsley: ESCALATED (Curly, Italian):** Supplies are improving quality is fair.

**Rapini:** Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

**Red Cabbage: ESCALATED** Pricing is escalated, and quality is good although supplies continue to be tight. Market remains very active, but things do seem to be improving.

**Spinach: WATCHLIST** Quality is good but some growers are seeing very tight supplies due to soil temperature and germination. Expect to see some prorates.

**Spring Mix:** Supplies are good with very good quality.

**Snow Peas and Sugar Snaps: ESCALATED** Guatemalan snow pea production continues to improve. Sugar snaps have started as well. Peruvian peas are available in Miami, but quality is poor. Markets are less active on snow peas and more active on snaps. Out of the west, snow pea supply is steady, and sugar snap pea supply and quality are slowly improving.

#### **Onions: ESCALATED**

There is a high demand anticipated for the upcoming week to meet the supply. Production in California has decreased, as some summer shippers have already completed their deals. The recent high temperatures may lead to quality issues. Washington started in a very small way on yellow and reds. The initial size profile is expected to be on the smaller side, which is typical for early varieties. New Mexico is also experiencing a small onion profile currently, resulting in an increase in the price of jumbo yellow onions. Late varieties are generally more visually appealing than early varieties. New Mexico will end for the season in the next 5-7 days. By the beginning of September, we will transition to Idaho and Washington.

#### **Potatoes:**

The market continues to feel stable on all sizes and grades for the moment. We continue to see 40ct/50ct/60ct remaining tight. They are available in mixer quantities, but heavy volumes do not seem to be available now. Smaller size potatoes continue to remain plentiful and challenging to move. There is not much further for the market to fall here, as growers are at the point where it would not make any financial sense to pack them at lower pricing levels. While relief was widely expected for this coming year, nobody thought the FOBs would be quite as low as they currently are. At this point, there does not seem to be a scenario where the market turns around any time before the Summer. The positive news is that quality is strong throughout the state, and there should be no shortage of available products in all sizes and grades. In fact, there will likely be an overlap of this year's current crop into next year so next year could unfortunately be a tough year for grower returns as well.

#### **Tomatoes: East Coast**

- **Round Tomatoes: ESCALATED** Supply was lighter this week due to weather related delays on greens and VR's. We still recommend subbing to romas as we see volatility in the round market continuing through November.
- **Roma Tomatoes:** Despite the rain, supplies have been stable, and we do forecast a lighter harvest this week with markets firming up a tad. Overall quality will be good this week.
- **Grape Tomatoes:** Good supply available this week. Quality is outstanding.
- **Cherry Tomatoes:** Supply is stable with moderate demand. Quality is good.

#### **Tomatoes: Mexico**

- **Round Tomatoes: ESCALATED** Growers are dealing with quality and supply issues out of Jalisco; the best quality is being harvested on the Baja. Volume was lighter this week crossing Otay and McAllen. We expect to see volatile markets continue through October where we will see flushes of fruit, then tighten back up once again until November. We recommend subbing to romas to avoid supply interruptions.
- **Roma Tomatoes:** Good supply available in Otay, Nogales and McAllen this week. Quality is outstanding
- **Grape Tomatoes:** Good supply available and quality is very nice.
- **Cherry Tomatoes:** Steady supply and good quality available crossing through McAllen and Nogales.
- **Medley Grape Tomatoes:** Good supply available this week and quality is good.
- **Tomato on the Vine:** Steady volume available this week.

#### **California Tomatoes – EXTREME**

- There will be more fruit available this week as growers break newer blocks and hopefully bring some stability to the market for the next few weeks.

#### **Other Fruit:**

**Apples:** Washington State Apple Crop continues to produce good supplies and good quality products. The Core Varieties, Reds, Golds, Galas, Fujis, Gr Smiths, and Honeys, will make it to a new crop. Galas are down 600,000 boxes from last year, but the state still shows availability that will likely last for the new crop.

**Pears:** The crop appears to be 5 weeks from being finished for the Season. The Bosc Crop is finished for the Season, and Red Anjou should be done in the next 4 weeks. Northwest Bartlett Crop should start around August 8th, leaving us about a 2-week gap between old Anjou and New Crop Barts. The Wenatchee Valley Pear crop was devastated due to freezing temps in February. The Yakima Valley and Hood River Growing Regions were hurt but not nearly as badly as Wenatchee. Bottom line – Pear crop will be extremely tight the entire '24/'25 season.

**Cherries:** Almost done for the season.

**Tree Fruit:** Lighter supply available as the season winds down on Paches and Nectarines. Good volume available on red and black plums.

**Kiwi Fruit:** Supplies are tight out of Chile and markets are firming up.