

# the Forecast

## GREETINGS

Well folks, we've hit the time of year affectionately known as "the Dog Days of Summer." Hot days, warm nights, Backyard grilling, and cold beverages with our favorite soundtracks playing along!

This also means fresh local produce. Short, regional deals are getting under way and are starting to have an impact on the fresh produce supply chain. Whether you consider it a blessing or a curse, local and regional deals play a large role in keeping supplies steady on many crops across the country and are the livelihood of countless families and communities throughout the summer. Expect these local deals to last into the early fall at which time the momentum will shift back to traditional shipping regions from the west and the south.



As summer wanes and the days get shorter and the nights begin to cool, we will see the Northwest begin harvesting new crop apples just in time for the upcoming school year. Also in the NW we will see potatoes and onions harvested, shipped and stored away to be packed in the winter.

Volumes will begin to increase out west and the fields will be full of activity preparing ground and completing capital improvement ahead of the busy winter months. It's hard to imagine that while we are in the middle of summer, there are many who are already mapping out and planning for the fall and winter. Feeding America is a beautiful thing and it never stops. We are proud to be a part of something so important and so exciting. Enjoy the rest of your summer.

As always, feedback is encouraged and appreciated. If information is missing or if there are other topics you would like covered in *The Forecast*, please email me ([jcimino@proactusa.com](mailto:jcimino@proactusa.com)).

Cheers,

Joe Cimino, V.P. of Procurement



# Commodity Updates

## Transitions & Temperatures

**Bell Peppers (Eastern):** Green pepper will transition in late June from Georgia and South Carolina to North Carolina then to Michigan and New Jersey in mid – July and continue through the end of the third quarter.

**Bell Peppers (Western):** Green pepper will transition to Gilroy, Oxnard, and Santa Maria by mid-August and continue through mid-November. Colored Pepper will take place, Same as the green. Finishing in Fresno and moving to Gilroy, Oxnard by Mid-August through the end of November.

**Citrus (Limes):** Limes are produced in Mexico and basically come out of the same large growing region. Growers are set up to rotate around the area and collectively come in and out of old crop and new crop orchards together.

**Cucumbers (Eastern):** The transition for cucumbers will start in late June to early July. Once we get a good mix of product in New Jersey and Michigan we will stay in those regions throughout the third quarter using the other areas to fill if a gap or quality issue comes into play.

**Eggplant (Eastern):** Eggplant will transition to the Carolinas the first of July then to Michigan and New Jersey the fourth week of July and remain there through the third quarter.

**Grapes (Green):** Transition into the San Joaquin valley looks to be normal start dates landing between July 5-10th . Recent cool spells and upcoming spiking heat wave will move that around a bit with Arvin/Delano districts being affected less the northern Tulare/Madera districts. The hot/cool fluctuations we've seen recently have affected the bloom and shatter sprays. We should be in full production by July 15th and will remain in normal harvest for the duration of the quarter as is typical for the California season. There have been some pulling of vineyards and redevelopment into newer varieties, but nothing that would cause anything drastic.

**Melons:** Both cantaloupes and honeydews will transition from Arizona to California the first week of July. Weather is expected to be normal for the West Side Season.

**Onions:** Onions will start to transition back to the Northwest as we get to the end of the third quarter.

**Squash (Eastern):** Squash is transitioning up the coast now from Georgia to New Jersey and will transition to Ohio and Michigan the third and fourth week of June. The supply will primarily remain in Michigan and New Jersey until mid-September when we will start to transition back south to North Carolina and Georgia.

**Stone Fruit:** Stone fruit goes through the 3rd quarter and basically finishes in September at which time offshore will begin to knock on the door. Nothing out of the ordinary is forecast for the weather.

**Tomatoes: East** – North Florida, South Carolina are into Summer crops and will transition to Tennessee and Virginia beginning mid July. California will carry the demand for the nation until late October when Florida operations begin harvesting again. **West** – Baja is crossing into San Diego and Mainland Mexico is crossing Texas helping western supply through October. California will have an influx of supply by mid July and go until the first rain of the season usually near the beginning of November.

## A Peek at Peak Seasons

**Bell Peppers(Eastern):** The Peak on bell peppers will be early August loading in Michigan and New Jersey, until then supply will be spotty.

**Bell Peppers(Western):** Green bell peppers can expect peak volume by the first week of July continuing through the first week of August.

**Cucumbers (Eastern):** Look for peak volume on cucumbers after July 4th through the third week of July and again the first of September.

**Eggplant (Eastern):** Peak supplies of eggplant will come in mid-August.

**Grapes (Green):** Greens are peaking now with plenty more to get in Mexico while Coachella continues a steady harvest with normal production.

**Grapes (Red):** We are over the peak out of Mexico with Hermosillo finishing up and Caborca into its harvest. Coachella will be finishing Flames and waiting on Scarlet Royals to start.

**Melons:** Both cantaloupes and honeydews look to peak during the first part of August through the third week of September.

**Onions:** Onions will be in peak season July and August shipping out of both California and New Mexico.

**Squash (Eastern):** Peak supply for squash in the third quarter will be the first three weeks of July and then again the second and third week of September.

**Squash (Western):** Expected to peak in Mid-July through the end of August.

**Stone Fruit:** The overall peak happens mainly in August.

**Tomatoes:** National supply will peak mid to late July with a majority of overall volume coming from the California valley.



# Commodity Updates

## APPLES

We will begin the quarter with Washington controlled atmosphere (C.A.) Red Delicious, Golden Delicious, Granny Smith, Pink Lady's, Gala's, and a few Fuji's. All of these variety's are larger and have limited supplies of small fruit. The Granny-smith and golden delicious are especially short on the smaller sizes. Some shippers will start to finish with Fuji's, Gala's, Pink's, Gold delicious and Granny-smith in late June. Most will go through July, so the length gaps varies by a few a weeks. And then the larger Washington suppliers should transition from C.A. fruit right into new-crop. Michigan, Idaho, and Pennsylvania will start with new-crop as we get into August/September.

Once we hit early August we will get our first new crop in California. California Gala's will start on 8/01, followed by Granny Smith on September 1, Fuji's on 9/06, and Braeburns on 9/05.

Washington will transition into new-crop as follows: Gala's on 8/01, Honeycrisp on 9/01, Fuji's on 9/07, Granny-smith & golden delicious on 9/15, red delicious on 9/20, and Braeburns and Jonagolds on 9/27.

Michigan will start packing Gingergolds, golden delicious, and Paula reds on approx 8/25, then McIntosh, Gala's, and early Fuji's on 9/01, followed by red delicious, Honeycrisp, Empires, Jonathans, and Cortlands on 9/15, and finally Red Romes, Idaho reds, and Braeburns on 9/20.

Idaho will start packing their first Gala apples around September 1st and then they will pack Jonathans in mid September.

Pennsylvania will start to pack a few Gingergolds, Honeycrisp, and Galas towards the end of September.



## ASPARAGUS

**Mexico:** Central Mexico will be in full production through the 2nd week in July, then start to taper off, and finish in early August. Quality should remain good until the end of July.

**California:** They should be wrapping up production during the first 2 weeks of July due to seasonality.

**Peru:** At the start of this quarter Peru will be into their winter season which will affect sizing, and slow growth. The larger sizes will be very scarce for the first 6 weeks in this quarter. We should start to see volume in the middle of August through the end of the quarter.

# Commodity Updates

## AVOCADOS

Total volumes in the market will be a mix of Mexico, California and Peru during quarter 3. In general, California fruit will stay markets in the West, with Mexico carrying heavier volumes in the Midwest and East. Total volumes during this quarter will be similar as last year during this period. Total market demand is expected to out-pace supply, keeping pricing high during the quarter.

**Mexico:** The new summer crop (Flor Loca crop) looks to start in early to mid July. Projected crop is expected to be 20 percent smaller than normal. Moving into and through August and September to the start of Mexico's new season main crop, projections are similar to that of 2016.

**California:** California is having a down year for volume. The crop is expected to come in at 50 percent less than the 2016 crop. Harvest has been running ahead of pace due to growers picking into a hot market. We will see a weekly drop in volume in July and August and anticipate that California will complete its major harvest by late August, this is about 4 to 6 earlier than normal.

**Peru:** Peru's projects for July is good steady supplies and then begin a steady decline as we move through August and mid September as they end their season.

## BELL PEPPERS

**East:** The bell pepper market has been in short supply in Georgia and South Carolina mainly due to rain. Recently the Southeast has been in a tropical pattern of thunderstorm keeping growers from picking the volume of pepper that needs to be picked. This weather pattern will cause some quality issues and in all likelihood bring an early end to the pepper deal in Georgia and South Carolina. During the third quarter supply will start in North Carolina for a short window then to New Jersey and Michigan. The North Carolina crop has been hurt by weather with wide spread reports of hail damage. Once growers go in and pick the first fruit and clean the bushes, the next time through the product should look a lot better but this will cut the supply. Michigan and New Jersey will start mid-July with good quality crops and continue through the third quarter. Look for the third quarter to start strong with light supplies in the east until late July when better supply starts across the northern tier of the country.

**West:** Green pepper production has started to improve in Fresno California, Color, Quality and Condition are currently very good which will continue with volume until the second week of August. Colored Pepper- (Red and Yellow) open field colored pepper is expected to remain limited in supply for most of the season, just a hand full of growers offering product in California. Fresno will continue with supply until the second week of August.



# Commodity Updates



## BERRIES (BLACKBERRIES)

Blackberry production will be in several different regions during quarter 3. Salinas and Watsonville areas will continue to harvest the entire time with peak production expected early on, then gradually decline starting mid July. Santa Maria and Oxnard production will be light and steady in the beginning of the quarter then ramp up by August and September. Georgia will be in peak production as we start July and taper off by the middle of the month. Baja and Mexico are expected to start in September. Taking all areas into consideration, we expect to have consistent supplies and good quality through the quarter.



## BERRIES (BLUEBERRIES)

Blueberries seem to be in a constant state of transition as we move from one growing region to the next. Quarter 3 is no exception. California harvest has past its peak and we will see production quickly decline and come to an end as we start



July. We will then transition to the Pacific North West (Oregon, Washington and British Columbia). Oregon's weather is warming up and blooms have opened. We expect the first harvest to start the first week of July and volume to increase by the middle of the month. Washington will follow shortly after with an estimated start date of July 10th. Washington's weather has been cool, but is starting to warm up and is expected to be on track for a normal season. British Columbia will start late July and production will last through August. Toward the end of Q3, Baja and Mexico will start and help fill demand for September. On the east coast, New Jersey is expected to ramp up production in the beginning of July and will taper off by the end of the month. The peak of production as a whole will be mid July through the first 2 weeks of August.



## BERRIES (RASPBERRIES)

We expect to see consistent supplies of Raspberries throughout Q3. We will have several areas in production during this time. Salinas and Watsonville will be harvesting the entire period. We expect to see the first peak early in July, then volumes will gradually taper off through late July with an increase again in August. Santa Maria will continue with light production throughout the period. Oxnard will be light in the beginning but will increase production by late August into September. Toward the end of Q3, we expect Mexico to start with light volume by mid September. Quality is expected to remain strong in all areas.



## BERRIES (STRAWBERRIES)

By the front part of Q3, most of the Santa Maria harvest will be done with the exception of some of the larger shippers who will have limited production through the summer. The primary growing and loading areas will be Salinas and Watsonville. We expect harvest to reach its peak in the beginning of July then gradually decline through the following months. We will see an overlap in growing regions as Santa Maria and Oxnard summer planted fall crop with start around the tail end of this quarter; sometime in mid to late September. Barring any major weather disruptions, we expect to see steady supplies and good quality throughout Q3.



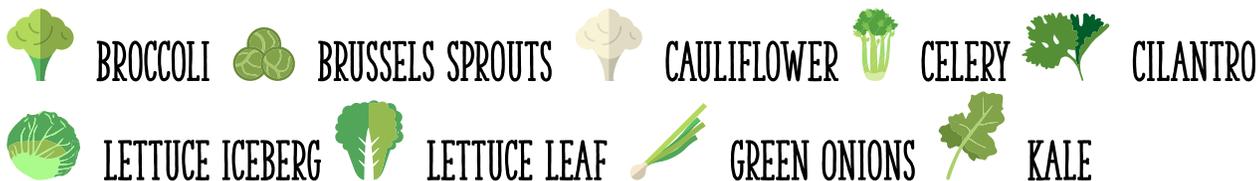
# Commodity Updates



California plantings are good in the Bakersfield and Santa Maria growing areas. Expected yields on conventional fresh carrots, baby peeled and value added look to be very good. Sizing will be very good, leading to projected good supplies of jumbos through the quarter.



Production will continue on chili peppers from Baja California and limited supply from Central California production is lighter this season than last due to early weather and expected labor shortages, Quality is good and expected to continue as we move deeper into the season.



**Santa Maria/Oxnard:** The upcoming third quarter has positives as well as negatives that can be expected in the southern California region. On the positive front, the weather in the southern California region has been good overall from the last weeks in April until now. This has allowed growers to plant for the future months with little to no weather conditions to alter plantings. If you recall, the first quarter was a disaster in terms of heavy rains and cold weather that carried into the second Quarter. Harvesting product was set back 4-8 weeks depending on the commodity and the result was little product and escalated pricing throughout the marketplace. Suppliers are expecting a bumper crop this year with a potential increase on leaf and lettuce items by 10%. The moratorium on celery in Oxnard will start July 15th and growers will not be able to plant until August 5th. All planting were finished by April 15th. In essence a 4 month gap in Oxnard will occur. Santa Maria and Salinas will pick up production as well as Michigan to offset Oxnard production for this time frame. Oxnard plantings will begin in early August, and harvest will begin approximately in early November.

Growers in this region are very concerned with labor issues that will inevitably effect the marketplace. We have experienced a bidding war of sorts with hourly workers(hoeing, irrigation, weeding , etc) that will result in wages skyrocketing. The solution many suppliers are using is a utilization of the H2A PROGRAM, WHICH IS VERY COSTLY BECAUSE IT GUARANTEES WORKERS BEING PAID, WHETHER THEY WORK OR NOT. Along with the competitive wages, some growers will be required to provide housing and transportation for the workers, further raising labor expenses. As always, this region will be the best choice to purchase miscellaneous items like parsley, kale, cabbages and leeks just to name a few items.

**Salinas Valley:** As we take a look into the months of July, August, and September in the Salinas Valley, we will be in peak production for all commodities. The summer months can lead to some volatility as well. Typically less acreage is planted to combat all the locally grown produce. As the weather can change in those locally grown produce areas, they will switch to commodities out of Salinas which will cause serious spikes in the market. Suppliers have had optimal weather for plantings this season on cauliflower, broccoli, lettuce, leaf, romaine hearts, celery, and most mixed vegetables like parsley and cilantro. We will continue to see the typical waves of decreased and increased supplies of all commodities during these months. I do not see what we faced last year with suppliers being 7 to 14 days ahead of harvesting schedules creating a severe gap. Although I do foresee a major lack of the typical labor force. As an industry we will continue to see this struggle during these months and years to come. The real factor of course will be weather. Will we either have the typical fog / marine layer with moderate temperatures or will we see the swings in the temperature like last summer. That is yet to be seen. Overall I see good production with all commodities in the next three months.



# Commodity Updates



## CITRUS (LEMONS)

California Lemons will be coming 100 percent from the Ventura growing area July and August and the first part of September when the Desert crop begins with light volume. No substantial volume from the Desert crop expected until mid to late October. The Ventura crop is 65 percent harvested. This winter rains has brought size growth to the lemons and fruit is peaking towards 140s and larger sizes, with the percentage of 165s and smaller sizes much lighter in volume. Demand is out-pacing supplies and we anticipate the same for the balance of the summer. We will see Chilean fruit to come in with some volume by mid July, but over volume is uncertain. The strong US market should encourage them to send some usable volumes. Mexico will begin sometime late July to early August.



## CITRUS (LIMES)

A lack of rain caused a drought in Mexico a few months ago which suppressed growth. In the coming quarter we can expect to have a fluctuating supply of limes with slightly fewer in July and August than normal due to the slower growth during the drought. During September volume looks to be above average due to the later than normal blooms caused by rains that finally happened. The next two months we stand to rising prices then an easing market in September as supplies increase. Quality for the first few weeks of July could suffer then get better and better as the newer crops take over production. The supplies going into July are from the older current acreage.



## CITRUS (ORANGES)

California's Valencia crop is approximately 25 percent down from last season. Projected peak sizes to be 88s/113s/72s. With the Navel crop ending early this season, the harvest and marketing of the Valencia has starting earlier this season and more fruit has been harvested than we would normally see at this time of year. Shippers will be pacing out their weekly pack in an effort to make the crop last through September. Over all, this quarter will be very short on oranges.



## CUCUMBERS

**East:** Currently there is a wide range between number one supers and select and cartons. Number one product has been in short supply while selects and cartons have been very reasonable. For the third quarter supplies will be spread across the northern tier of the country, New Jersey, New York state Ohio and Michigan. As of now the crop is on time to start light volume in late June and continue through the entire third quarter. The quality of the crop looks good with no skips in the forecast. The southeast is having weather issues and will end early so the third quarter could start off with a strong market until these growing regions pick up in volume.

**West:** Production on Cucumber is from the Baja crossing through San Diego with much more limited production in the summer as compared to the spring. Quality is now very good and expected to continue peaking mostly on Plains and Selects because of the most recent heat. Very limited supply of Super Select (15%) and cartons are peaking on 24s. Color and condition are currently very good and are expected to continue.



# Commodity Updates



## EGGPLANTS

**East:** In Georgia, Eggplant is currently in good supply and is surviving the rain better than the other crops. Supply should continue until the 10th of July. The supply during the third quarter will be coming from Georgia, the Carolinas, New Jersey and Michigan. There is not a lot of acreage planted in the Carolinas or Michigan, New Jersey is typically a good supply of eggplant. The early reports are good for both the Michigan and New Jersey crops, New Jersey was running behind but with recent warm weather the crop is starting to catch up. The third quarter should start off with a good supply of eggplant then supplies in the second and third week of July will tighten up due to less acreage planted in the mid-Atlantic. In late July when New Jersey and Michigan start to harvest it will ease the pressure on the market.

**West:** Eggplant production is expected to be very limited for the next 100 days. Extreme weather in the San Joaquin Valley (Fresno) has made the crop poor in quality with very poor yield and condition. Expect supply to be very limited with unusually high prices.



## GRAPE

There will still be Mexican product available the first two weeks of July. Much of it will be situated in the Central Valley, as the trade tires of loading in Nogales. Coachella will also have some fruit during the first week or so. Black Seedless and Red Globes will be the last to finish, but there should be green seedless and red seedless the first week of July. Arvin was projected to start about June 28th or so, but we suspect that will be delayed due to the excessive heat predicted for June 25th-30th. There is a decent size red crop, but greens are light. So, there might be some overlap, but some predict a small gap. The Delano and Fresno districts should start picking Reds and Blacks around July 7th. Greens will start around the 20th of July. August will be a big volume month, and September will be the largest in volume by month for the entire year. Quality is projected to be very nice.



## MELON (CANTALOUPE)



## MELON (HONEYDEW)

The start date of the Westside melon season is running a few days behind schedule. Normally the season starts on or before July 1st but this year start dates have been pushed out to between July 5th and 8th as a result of delayed plantings in the spring due to rain. Some growers have reported planting slightly less acreage due to crop rotation but we do not expect much disruption. Weather up till now has been conducive to producing a good crop. The crops look to peak on 9's and scale down in volume as sizes get smaller with few 18's being on the harvesting schedule. Honeydews are mirroring the cantaloupes in overall acres and projected peak sizes are 5's and 6's with few 8's projected to be harvested. The season looks to run up until the first week of November which will have a short overlap with the desert which will have been going for a few weeks. Quality on both cantaloupe and honeydew looks to be very nice with great sugar levels.



# Commodity Updates



## MELON (WATERMELON)

Western seedless watermelon will be very short on supply due to the late rains (75 days ago) and the current heat 100-110 wave that is stressing the plants in the San Joaquin Valley. Plants are stressed and producing low yield, small size fruit. Very few growers for the summer crop in the West. Georgia, North Carolina, Indiana, Missouri, and West Texas will all have local volume, production will be depending on weather.



## ONIONS

Central California and New Mexico will be the main shipping points for Yellow, Red and White Onions through the end of this quarter. Quality is excellent out of both areas. Extremely hot temperatures above 100 degrees for 10 days the middle of June in New Mexico has hurt the sizing of the onions coming out of this area. Once the temperatures get above 99 degree the onions stop growing. The New Mexico crop will be peaking on Mediums/Jumbos with few Colossal larger being packed throughout their season. The quality of the crop looks to have held up through the high temperatures other than the sizing. Mother nature is always the wild card during the summer months. Heat and or rain could change the quality and markets quickly. Sizing out of California is peaking on jumbo's and larger with mediums and smaller limited. Look for this to be the case till we move to the Northwest. The market on Colossal and Super Colossal will be active due to limited supplies out of New Mexico with Jumbos and smaller fairly steady till the North West crop starts the end of this quarter. Washington is expected to start in a light way the second week of August on Yellow onions. Red and white onions will follow the end of August. Idaho/Oregon storage crop is slated to start the end of August with yellows which is a week behind schedule. Red and white onions to follow the start of September. Over all acreage planted is projected to be close to last year crop. Northwest storage crop will go until the middle to end of April, 2018.



## PEARS

We begin the quarter with a few offshore pears on both coasts as well as Washington D'anjous. The offshore product wont last long but Washington expects to have C.A. D'anjous through mid August. On approximately July 10 California will start packing new crop Bartlett & Stark Crimson (red) pears. They are expecting smaller size this year which is good for us as a foodservice company since we sell mostly 110/120/135/150's. California will start packing Bosc and Forelle pears on approx 8/01, then Seckles & Comice in mid August. Washington is scheduled to start packing new crop Bartletts on 8/10, red pears around September 1st, and new-crop D'anjou's on September 20. They are unsure on sizing.



## PINEAPPLES

Tropic's will be entering their lighter volume period during this quarter. Springtime's flush of fruit is followed by a down turn in volume. July and August we anticipate supplies tightening up, and as we move into September, look for volumes to begin to pick up again.



# Commodity Updates

## POTATOES

Potatoes are still coming out of storages the start of the third quarter with supplies winding down quickly. Big potatoes (40-70 count) are in a demand excess supply situation out of all shipping areas and will be till we get into new crop. Quality is still being reported good out of all areas with normal late season issue showing up in the packs. These include internal bruising, light hollow heart and occasional soft rot. Washington will start harvest the middle of July followed by Idaho, Colorado and Wisconsin which will start the front part of August. Weather during the planting season was unusually cool and wet which has pushed some growing areas 5-7 days behind. Cooler weather also could make for a mid to small potato crop in Tuber size. Only time will tell. Ideal weather the last few weeks is helping close this window and increasing the tuber size. Over all acreage planted is projected to be close to last year or slightly lower.

Look for the availability of the # 2's to go from plentiful to demand exceeds supply situation as we get into new crop. This happens every year and will stay limited till the end of this quarter.

## POTATOES (COLORED)

**East Coast:** we start the quarter in N.C. & Virginia with large spuds in all colors, so not many B's. Both states finish up in mid to late July. We then transition to Delaware in mid July for all colors, and then Big Lake, Minnesota a week to 10 days later. The Minnesota deal will go through the end of the quarter and we expect normal sizing which is 80% A size but they don't have any whites. Minnesota has good volume of reds and golds and they will be able to handle most of the east coast volume. There is gap on eastern white potatoes from early to mid August to the end of the month when Canada and Long Island start packing.

**West Coast:** Bakersfield will begin the quarter but they will only pack through mid July for most, late July for some, and then they will transition to Stockton, CA. Stockton will have all colors and they usually have 80-85% A size but are expecting their sizing to be slightly larger than normal. They will pack until approx mid September before they finish up. Once Stockton is finished we transition back to Bakersfield for Washington product that is brought down. So no gaps. Washington will start packing reds first in late August to early September, followed a couple weeks later by golds, and then shortly thereafter by white potatoes. Its to early to tell what type of sizing that Washington will have.

## SQUASH

**East:** The squash market has been high priced for the past six weeks mainly due to the lack of supply in the western U.S. Now their supply has kicked in and the market is leveling off. Supply is currently spread out from Georgia to New Jersey with Ohio and Michigan set to start light supplies the third week of June. Most of the third quarter supply will come from Michigan and New Jersey filling in with some supplies from western North Carolina. Late in the third quarter some supplies will start in Georgia. New Jersey is starting to pick up in volume now and Michigan will get into steady supplies the third week of June, North Carolina, would normally be shipping now and into the first of July, has had most of their acreage damaged by hail and severer wind. The third quarter will start off with good supplies across the northern tier of the U.S. and the crops appear to be in good shape with no apparent gaps.

**West:** Santa Maria will be our primary district on both Italian and Straight Neck Yellow Squash, Production will be steady with good supply on both items peaking on medium size (70%) followed by Fancy (30%) the crop has good stands with steady acreage and steady supply depending on weather. Santa Maria is traditional for steady temperatures with moderate breezes that will maintain a steady flow of production.



# Commodity Updates

## STONE FRUIT

Stone fruit started off later than normal this season. Growing conditions started off being pretty ideal for growing stone fruit. Temperatures lately have been fluctuating up and down which has caused a large size fruit set on the trees. July looks to carry the current lofty prices as the production works on evening out the uneven volumes the weather has produced. Washington has cherries during July and they finish the first week on August. The volume in August is setting up to better than July as production evens out and becomes much more consistent and we see persimmons come into the picture. When we come into September our nectarines and white peaches finish up. Yellow peaches, Fuyu's and some of the late plums run during September. The size curve throughout the 3rd quarter look to remain big with very little volume being harvested.



## TOMATOES

The tomato market is currently working to find stability after a rocky start during the beginning of June as central Florida began transitioning to Northern growing areas. Regularly during this time seasonally, eastern operations spread out into smaller local regional programs for the summer while the California valley begins to crank out a majority of the tomatoes driving national supply. This year however, heavy rains back in January caused California to replant and work through flood damage crops postponing the start of their season, that usually gets underway in June, until July causing a brief supply shortage. Currently prices are easing off with new areas getting started across the east. Northern Florida, South Georgia, South Carolina, Arkansas are all harvesting helping to increase overall supply but have had a lot of rain to work through this past week making for a challenging start come July as a lot of product will need to be worked through with questionable shelf life. Grapes and cherry toms are plentiful for now, but shorter supplies are expected the last week of June through the first week of July as growing areas continue rotating. Tennessee and Virginia will begin between July 10 – July 15 as North Florida and South Carolina finish. Parts of California have started operations already and as more shippers begin next week the valley is expected to hit their stride by mid July putting them in the driver seat controlling the market until November when South Florida begins major operations again.