



June 18, 2008

“The true test of character is not how much we know how to do, but how we behave when we don't know what to do.” – John Holt

Around Town:



ZOËS STORY

Zoës Kitchen is the natural extension of founder Zoë Cassimus' real-life kitchen – a place livened by her love of family and warm hospitality. Zoës Kitchen offers recipes created from scratch by Zoë throughout a lifetime of cooking for loved ones, neighbors and friends. Her avid gardener's sensibility for simple, close-to-the-garden ingredients finds its expression in deliciously fresh food that promotes good health. Zoë believes a balanced life includes spending time with family and friends over tasty, healthy food. If you miss this pleasure too often because you don't have time to cook, let Zoës Kitchen cook for you.

Locations include:

Crestline - AL Downtown Birmingham - AL Mobile, AL Montgomery - AL - Shoppes at East Chase

Patton Creek – AL SoHo/Homewood - AL Summit - AL Tuscaloosa - AL Phoenix - AZ – Camelback and West McDowell

Destin - FL - Destin Commons Jacksonville - FL - Ponte Vedra Beach and Riverside Baton Rouge - LA Lafayette - LA

Columbia, SC Brentwood - TN Green Hills - TN Dallas - TX - Snider Plaza and Lover's Lane/ Tollway Houston - TX



***** COMMODITY ALERT *****

Tomatoes: The FDA website shows Baja California Norte as cleared for tomato shipments to the US. A certificate issued by the Secretaria de Fomento Agropecuario Del Gobierno Del Estado de Baja California must accompany shipments.

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ADAMS PRODUCE PROJECTIONS

FREIGHT

Trucks in California remain as tight as they have ever been and market trucks are asking for and getting top dollar. Teams remain tighter than normal. Trucks in the Northwest and Idaho are tight as well with many trucks deadheading to California. The National Average on diesel did not change and is currently at \$4.692. Diesel in Salinas continues to be close to \$5.00 a gallon and is currently going for \$4.939 at the Pilot Truck Stop. Crude oil went up slightly and is currently at \$136.31.

APPLES/PEARS

Many of the varietal apples including Braeburn, Fuji, and Cameo have finished for the season with the exception of a few select lots. Demand remains strong for what light overall apple supplies are in Washington. Markets continue at higher levels and the pack out for what small percentage of the storage crop that is left is large sized and premium grade fruit. Expect prices to remain strong on all apples as we quickly move through June! Storage pears should last for another 14+ days and quality is holding strong for remaining fruit.

ASPARAGUS

Standard size asparagus is the predominant size available in the market. The growing regions of California, Mexico, Peru and Washington are all still producing this commodity. California grass continues to demand a premium price. Some shippers are making deals on Mexican product but only on standard and large sizes. The overall quality has been good. There have been a few reports of light decay and dehydration.

MARKET STEADY



AVOCADO

California fruit –California harvest continues at a slow pace as growers are still waiting for size to come. Many growers are size picking for 48's and 40's. Crop estimates have lowered for this year by 8 to 10 percent. There remains a light supply of #2 fruit, as the crop is very clean. Demand for fruit remains very good as less Mexican fruit is crossing into the States. The market is steady.

Mexican fruit – Rain in Mexico continues to slow their harvest. The Mexican crop continues to service mostly the Midwest and East Coast. Mexico's volume will remain light through the summer. Market is steady to firm.

BELL PEPPERS

Eastern Bells: This market has stabilized. The majority of the pepper volume remains in Georgia and Mississippi but by early next week Tennessee, Arkansas and North Carolina should begin picking. Quality is good at this time.

BERRIES

Strawberries: Strawberry supplies continue to be fairly tight this week. The temperatures have warmed up and should improve production. Shippers are reporting mature, ripe berries with overall good quality and size in the north and smaller berries in Santa Maria. There seems to be strong demand but the market remains steady.

Raspberries: Production remains steady. Weather conditions are currently ideal. Quality remains good. **Market steady.**

Blackberries: Mexican product is finished with the exception of remaining product in storage or product about to deliver. The shippers with the last Mexican product are cleaning up significantly cheaper than the Californian product. Most to all shippers or are well into Californian production. Kingsburg CA. and Watsonville areas are the main producers currently. Pacific North West is soon to start transferring bush-berries south.

Blueberries: We continue to experience a firm market. Georgia continues with good supply and quality. Other shippers are transferring blues up to Watsonville from Delano and Kingsburg CA. Quality is currently good with no reports of problems. The Carolinas are now producing better volume. New Jersey has started with light supplies but soon to increase.

BROCCOLI

The broccoli market is stronger. All suppliers have raised pricing due to lighter supplies. This market will be active over the next couple of weeks as suppliers deal with a gap in production. The early harvesting has put the suppliers now in a shortage, and with the processors trying to buy as much as possible supplies will be tight. Overall, the quality reported is good with a small amount of purple cast to the product.

MARKET HIGHER



CARROTS

West Coast supply and quality is good on all sizes. Texas has lighter supplies coming out of Mexico due to the rain. Georgia has good supply and quality. Michigan will start up in July. **MARKET STEADY**

CAULIFLOWER

The cauliflower market has come off a little. Lower pricing has been occurring throughout the week as suppliers continue to keep this commodity actively moving. Growing conditions have stabilized and suppliers are now able to adjust pricing. This market will be up and down throughout the season so please be aware. The reduced planting of this item will allow gaps to occur over the next four months in the Salinas valley. Some off white coloring is a common characteristic of this item at this time. Weights are reportedly around 28-32 pounds.

MARKET LOWER

CELERY

The celery market has had a noticeable decline. The Salinas valley has had good production and this has allowed this market to soften. Seeder is still prevalent in the fields but not nearly as dramatic as was the case in Oxnard earlier in the year. There is good availability in all sizes of celery this week. The weights have been consistently in the 60 to 65 pound range in both the Salinas and Oxnard growing regions.

MARKET LOWER

CITRUS

Lemon: Demand continues to be very good. Growers are harvesting at a rate to meet demand in most sizes. Fruit is peaking on and 165's, with 115's and larger are looking to tighten in supplies as there is not a lot of size growth. Storage levels are remaining steady, but continue lighter than normal for this time of year. Demand is very good. The market is steady.

Oranges: Growers are finishing on regular Navel's, and Late Navels look to continue for two more weeks. Valencia orange demand continues to improve, with the strongest demand on 88's and smaller. Quality is very good. The market is steady.



CUCUMBERS

Eastern Cucumbers: The cucumber market has tightened up with very little availability in all sizes. Once the northern growing regions kick in, the market should begin to come off. Quality is marginal at this time.

GRAPES

Overall, grape production is on the decline for both the product of Mexico crossing through Nogales and product of USA in Brawley and Coachella. Market conditions this week will remain relatively steady. However, look out for next week and the following as large Fourth of July promotions start, and the grape supplies in all colors tapers off for the spring deal. The Bakersfield districts could start as early as the first week of July, but there will be light supplies to start. Sugarone green seedless are in excellent supply this week and next and there are promotable prices out there! Overall quality is excellent on all grapes!

ONIONS GREEN

The green onion market continues on both the domestic and Mexican side to be steady. Browning and decay continue to exist in certain lots from Mexico. Suppliers continue to assure customers that the product is being watched closely. Overall, the pricing has remained the same with most suppliers.

MARKET STEADY

KIWI

The markets are soft for light demand of Chilean Kiwi. Expect supplies to continue and prices will be steady into next week. New Zealand Kiwi is commanding slightly higher pricing, but supplies are good there as well. Kiwi quality from all areas is very good!

LEAF LETTUCE

The leaf market is stronger with most suppliers. The Salinas valley and the Santa Maria growing areas had experienced high temperatures in the previous weeks. The yields were lower with many growers, thus the increase in pricing. This will likely create some defects such as internal burn, tip burn and mechanical damage throughout the week. Expect pricing to be active the following week. The weights continue to show red and green leaf at 20 to 24 pounds. Romaine weights consistently range from 38 to 44 pounds.

MARKET HIGHER



LETTUCE

This commodity is getting stronger in the marketplace. Some suppliers have light availability and this has caused pricing to vary among the shippers. Expect this market to be active all next week, as supplies will continue to be on the lighter side. Demand is expected to be strong the following week. The overall quality has been reported as being good in terms of color and texture. The weights continue to average 41-46 pounds. This item has mechanical damage reported in small quantities.

MARKET HIGHER

MELONS

Honeydews: Mexico production continues to tail off for crossings into Nogales and that will continue into next week. The CA/AZ desert production is dropping off dramatically, and will continue to do so with mostly large sized fruit (5's and mainly 6's)*. Markets are very active going into the weekend and demand continues very strong for the light availability. Next week expect more of the same with lighter supplies and HOT desert temperatures could clean that deal up quicker than anticipated. The Bakersfield district for the Central Valley summer deal could start as early as next week with light supplies. Looking ahead there is HOT temperatures expected over the next 10-14 days and could quite possibly hurt the front end of the summer melon production.

Cantaloupes:

Cantaloupe production is winding down in the CA desert regions and some growers have already finished in the Yuma/Brawley growing areas. HOT temperatures are presiding and more small cantaloupes are coming on. Look for supplies to drop off again next week and the Arizona desert will be the main player. Markets will get active next week with shortened supplies and demand increases for Fourth of July ads. The Central Valley summer deal looks to be starting around the 1st week of July, but with HOT temperatures predicted over the next 10-14 days, production may be negatively affected.

ONIONS

Huron, California and New Mexico are going strong with good quality and availability. There are deals to be made on load volume out of California. It looks like the market will stay unsettled for the next week or so and then level out.

Vidalia Onions are still going with good quality and volume.

Market steady to lower



POTATOES

Extremely short supplies will continue on Russets with market prices continuing upward.

The Burbanks are running very small out of all areas with many more #2's than usual this year. Market is continuing to go up and looks to continue to increase as the season winds down. New crop Idaho's are behind schedule and may start mid August or September. Overall acreage is expected to be down as far as 20% this year on new crop product.

Washington storage product has a poor pack out as well, with some shippers running limited days to stretch out supplies. Washington new crop is expected to start around August 1st.

Colorado is done for the season and should be into new crop around August 1st.

Nevada is still in very small Burbanks and they are now in lots with less #1 product as well.

California Russets have started with limited availability market prices are high.

New crop red, white and gold potatoes out of California with good availability.

North Dakota has finished for the season.

Arizona is going with good availability on reds and golds.

SQUASH

Eastern Squash: Above average temperatures in the southeast are creating quality issues in squash, leading to an increased market. Despite good volume, these quality issues are keeping this market from softening.

STONE FRUIT

There are Apricots, Peaches (White and Yellow), Nectarines (White and Yellow), Pluots, and Plums available in EXCELLENT SUPPLIES. California Cherries are finished for the season. Washington has started their early summer red varieties as well as a few Rainiers and volume is light as was predicted due to the late spring frost conditions. Markets are very strong for Washington's new crop fruit that is in very short supply to start their first week. Expect continued good numbers of all California stone fruit and excellent quality!

TOMATOES

Eastern: Most shippers in FL. continue in the same situation with a significant volume of ripening tomatoes. In some cases, this is creating opportunities to make some off market deals on higher color tomatoes. Market is steady for now but with many other areas coming on line this should weaken.



WATERMELON

Light supplies from Northern Mexico, Arizona, and California, coupled with increasingly strong demand as we approach Fourth of July pulls have the market active and higher going into the weekend and next week. Overall, for both seeded and seedless, eating quality is very good!

VALUE ADDED

This market is steady like the previous week. Although some lots of romaine have had slight bruising, overall, the quality has been good. The green onions continue to give processors the biggest problems. Mexican product will continue to be the biggest challenge.