



MARCH 23rd 2009

“Coming together is a beginning. Keeping together is progress. Working together is success.”

Henry Ford

Commodities at a Glance

| <u>Commodity</u> | <u>Quality</u> | <u>Market</u> |
|------------------------------|----------------|---------------|
| Apples | Excellent | Steady |
| Asparagus | Good | Lower |
| Avocado (Mexican) | Good | Steady |
| Avocado (Chilean) | Good | Steady |
| Bell Peppers Green | Fair | Lower |
| Bell Peppers Red, Yellow | Fair | Steady |
| Berries: Strawberries | Good | Lower |
| Berries: Raspberries | Fair / Good | Steady |
| Berries: Blackberries | Good | Lower |
| Berries: Blueberries | Fair | Higher |
| Broccoli | Good | Higher |
| Carrots | Good | Steady |
| Cauliflower | Fair | Higher |
| Celery | Good | Steady |
| Citrus: Lemons | Good | Steady |
| Citrus: Oranges | Good | Higher |
| Cucumbers (Western) | Fair | Higher |
| Cucumbers (Eastern) | Poor | Higher |
| Grapes | Good | Steady |
| Green Onions | Good | Steady |
| Kiwi | Good | Steady |
| Lettuce: Leaf | Good | Steady |
| Lettuce: Iceberg | Good | Steady |
| Melons: Cantaloupes | Good | Steady |
| Melons: Honeydews | Good | Steady |
| Onions | Good | Steady |
| Pears | Excellent | Steady |
| Potatoes | Excellent | Steady |
| Squash Yellow | Fair | Higher |
| Squash Zucchini | Good | Lower |
| Stone Fruit | Good | Steady |
| Tomatoes Roma | Fair | Higher |
| Tomatoes Count | Fair | Higher |
| Watermelons Seedless | Good | Lower |

| BRIX READINGS TABLE | | |
|---------------------|-------|-----------|
| CANTALOUPE 12ct | 10.25 | AVERAGE |
| CANTALOUPE 15ct | | |
| HONEYDEW | 10 | POOR |
| PINEAPPLE | 14 | AVERAGE |
| RED GRAPE | 19 | EXCELLENT |
| GREEN GRAPE | 19 | EXCELLENT |
| STRAWBERRIES | 10.25 | AVERAGE |
| RASPBERRIES | 12.5 | GOOD |
| BBLACKBERRIES | 13.5 | GOOD |
| BLUEBERRIES | 12.5 | GOOD |

Within a given species of plant, the crop with a higher refractive index will have higher sugar content, higher mineral content, and higher protein content. This adds up to a sweeter tasting, more mineral-nutritious food with a lower nitrate and water content and better storage characteristics. As a broad generalization, produce over 12 Brix is considered good

Weather:

Warm temperatures will continue this week in the Western growing regions ahead of a Pacific storm system expected over the weekend. Temperatures are expected to reach the Low 70s in Central California, 80s in Southern California and 90s in the Desert growing regions. Temperatures in these desert regions (Yuma) on average reach 90 degrees on March 22, this year they topped the 90 degree reading on March 2 and have continued to be above normal for the most part. A cool down along with breezy conditions will begin late Friday ahead of a fast moving storm system that will clear out of the region by Sunday. Rain is forecast for Central California with a chance (40-50%) of rain expected in Southern California and a very slight chance of showers forecast in the desert region. Current forecast models differ slightly but most suggest widespread measurable rain remains possible for Southern California over the weekend. High pressure builds following this storm system with seasonal temperatures expected early next week.



ADAMS

A Fresh Produce Distributor

COMMODITY REPORT

APPLES/PEARS

Washington remains the leading production area for apples and will so through the spring and summer months. Regional production areas including Michigan and New York continue shipping light supplies of storage apples; demand remains light for those. Washington and Oregon Pears continue production from storage including mainly the Anjou, Bosc and only a few left in the Golden Bosc varieties.

ASPARAGUS

The market has been steady for the past few weeks. Prices look to be stable for this week also. Good supplies from Mexico as well as California keep this market at low competitive prices. Most shippers have good supplies of 28/1# and 11/1# pack sizes.

AVOCADO

- **Mexican fruit** – Mexican is bringing good steady supplies into the states. Supplies are good. Demand continues to be good.
- **Chilean Fruit** – Still a few Chilean avocados coming in, but very limited. Their season will be finish by the end of the month.

BELL PEPPERS

- **Eastern Bells:** The market on bell peppers is holding at current levels and should stay that way through the weekend. High markets on the west and anticipated gap in growing areas will keep the market from any significant drops for another week or two.

BERRIES

- **Strawberries:** California strawberry production is now picking up momentum. All shippers have lowered their fob and are looking for good business for the balance of the week. There is load volume available today, increasing as the week progresses. McAllen is finished shipping Strawberries and Driscolls is only shipping Raspberries and Blackberries out of Loop cold storage. Florida is starting on their down slope to the end of their season, as the plants are certainly past their "peak production" stage. We are seeing small fruit with high count (28 – 30) per 1# clam. We can expect to see Florida finishing up by mid April (quality will dictate).
- **Raspberries** Raspberry production continues tight this week and will continue to be snug due to diminished transfers from Chile and Mexico. There has been some local California production, but the numbers have fallen greatly. Quality has been affected with California production. We can expect tight supplies until local northern and southern Californian production gets going.
- **Blackberries:** Blackberry production is steady with respectfully consistent transfers arriving from Mexico. There are some shippers in much better shape than others but definitely less product than in previous weeks. We are now looking at local production to increase but are currently dealing with predominantly transferred fruit.
- **Blueberries:** Blueberry transfers are slowing down from Chile and some shippers are looking for higher fobs. We are seeing less fruit arriving on vessels, and taking longer to be released. Some shippers are expressing that we may see the end of Chilean product by the end of the month. There are small quantities of local Californian blues with great size and quality (under hoops). All other blueberries are air freight with less volume on the transfers. We can expect a gap as the eastern early varieties were affected by early frost damage.

BROCCOLI

The cold night time temperatures in Salinas & Santa Maria coupled by the Yuma growing region finishing up has caused this market to react. Prices will be very active all week. There looks to be more availability on bunched broccoli versus the broccoli crowns. Expect crowns to be tight for the duration of the Yuma deal. Mexico production continues to be an option for broccoli crowns.

CARROTS

California carrots have moved into new fields in Imperial Valley. Size is running small right now as cool weather has slowed growth. This has lighted supplies of jumbo sized carrots. Size is expected to come back in 2 weeks. Quality remains good. Georgia has good availability and quality on the East Coast.

CAULIFLOWER

Availability is much tighter with all suppliers. Salinas has started some early production. Expect this commodity to be active throughout this week as most suppliers begin to finish up the season in Yuma. Demand is definitely stronger. Some defects showing up include black spotting and yellowing upon arrivals.

CELERY

This market is steady. Yuma is finishing up production this week and Oxnard will be the main area to pull product. There are lighter supplies of the smaller size celery with most price deals being made on 24 counts. Salinas will not start production until late May to early June.

CITRUS

- **Lemon:** The Coachella and Yuma areas are 100% picked and the Central Valley is 70% picked. Most of the volume is coming out of Ventura County. Supplies are peaking on 140's. There are good supplies of 165's, with 200's being a little on the tight side.
- **Oranges:** There will be good supplies of Navels available into May. Peak sizes are 48's through 88's. There is limited harvest starting on Valencia's.

CUCUMBERS

- **Eastern Cucumbers:** With Honduras finished up and South Florida still a good 2-3 weeks away from ample supplies, the cucumber market is at the highest it has been in over a year. Quality issues abound in the final off shore shipments while the beginnings of the domestic supplies are undersized and scarred. Scarce supplies and a screaming market will be the go for the next two weeks.



COMMODITY REPORT CONTINUED

GRAPES

For the next 2-3 weeks there will be a steadily large supply of green seedless grapes. Quality is excellent and there are even some JUMBO sizes available with excellent color and flavor! Prices are very attractive and both Coasts have very good availability. Red Seedless is still somewhat light and supply lines are varying from shipper to shipper. There are a few Flames still out there, but most all red seedless will be the Crimson variety from here on out. Demand is still strong for red seedless and looks to carry into the weekend. There are still only light supplies of Black seedless and seeded Red Globes, and overall grape quality remains very good.

GREEN ONIONS

This market continues to stay steady. Supplies continue to be excellent out of the Mexico growing region. The market remains steady with very inexpensive prices. Defects have been minimal.

KIWI

Italian Kiwi supplies are steady and demand is only moderate. Quality remains very good and with the fair demand the market will remain unchanged.

LEAF LETTUCE

This market is steady with plenty of supplies from most shippers. Expect this week's temperature to be in the 90 degree level in Yuma. It would be a good decision to switch to naked leaf to avoid the dehydration of the liner product. Most shippers continue to be ahead of their projected harvesting times on the leaf fields. Some Quality defects continue to include fringe burn, tip burn, and wind burn.

LETTUCE

The lettuce market continues to be stable. Most shippers have good supplies. The warm temperatures this week in Yuma will bring more fields ahead of their normal harvesting schedule. Huron production will start on Monday March 23. Supplies should be average with most suppliers throughout the front side of the week.

MELONS

- **Cantaloupes:** Demand looks to remain strong going into the weekend, especially on the smaller sized fruit (15/18's)*. The market will remain steady at the higher levels. Honduras/Costa Rica melons are winding down and Guatemala is approaching the start of their second cycle. That is still about 10+ days away. Continue to place orders with as much lead time as possible. Quality remains very good for all cantaloupes.
- **Honeydews:** Stronger demand for lighter supplies of Honeydews looks to carry us into the weekend. Overall supplies in both East and West Coast ports are down to finish this week and demand is up, creating a slightly higher market. Similar to the cantaloupes, Honduras and Costa Rica are winding down with Guatemala's second cycle approaching. Sizes on both coasts are concentrated to the 6 and 8ct, and the smaller the fruit has the better the prices right now! Quality remains very good!

ONIONS

There are several shippers in Idaho/Oregon finishing their pack out for the season. However, our main suppliers look to continue to have availability through the end of April. There are still good supplies of all colors and sizes of onions in Idaho and Washington. Mexican product is now in Texas with good supplies of all colors, quality is good. Texas onions will be available in the next couple of weeks.

POTATOES

Norkotahs are finishing up for the season and Burbanks will be the only varietal available out of Idaho. The market is steady but 70ct and #2-10oz still remain snug. We are trying to get all requests for a particular varietal fulfilled, by time of shipment Burbanks and/or Norkotahs may be the only product available. Wisconsin and Colorado have good supplies and quality. Colored potatoes are loading out of North Dakota and Wisconsin with Washington almost cleaned up for the season. California has good quality and supplies of colored potatoes. Florida is now going with good quality.

SQUASH

Eastern Squash: The squash market is making a dramatic downward turn after weeks at the higher levels. Plenty of warm, sunny weather has brought on good supplies. The market should continue to drop but more slowly, as Plant City begins to produce good volume in another 10-14days.

TOMATOES

Eastern: Tomato production in Florida is lower than Mexico but demand is keeping the playing field level. There has been no major upswing to pricing even with lower production. Cooler weather is slowing production and growth. There is more of the bigger fruit than smaller due to the fact that smaller fruit has been affected by the recent cold temps more so than the larger fruit. Grape tomatoes are starting to get a bit tight.

WATERMELONS

Watermelon supplies in both the seeded and seedless categories remain very light! The transition back to Northern Mexico is a difficult one and supplies just aren't there to meet the current demand. Demand looks to remain strong into next week for continued light supplies. Although there are light supplies, the quality is still very good.