



ADAMS
A Fresh Produce Distributor



WEEKLY NEWSLETTER AND COMMODITY REPORT

SEPTEMBER 21st, 2009

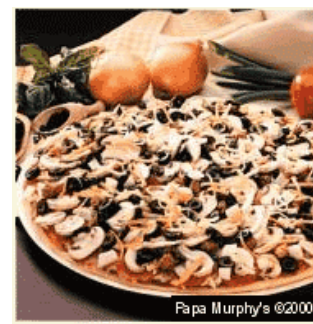
RESTAURANT SPOTLIGHT Papa Murphy's



Papa Murphy's pioneered the take and bake concept and is the largest take and bake pizza company in the world. The company is now the fifth largest pizza chain in the country based on U.S. locations. Today there are over 1,100 Papa Murphy's stores in 32 states and Canada, and they are expanding every day.

Papa Murphy's empowers its patrons. Not only do they decide which fresh, high-quality ingredients top their pizza, but customers have the pleasure of baking it right in their own ovens for a piping hot, delicious meal whenever they want. The dough is prepared daily in Papa Murphy's neighborhood stores using high protein wheat flour. Each pizza features fresh ingredients, including 100 percent all-natural, whole-milk mozzarella, cheddar and provolone cheeses. Real meat toppings, with no fillers, include savory Canadian bacon and premium salami, pepperoni, Italian sausage and ground beef. Other toppings, including fresh Roma tomatoes, whole mushrooms, green peppers and onions, are sliced and diced daily.

To find a Papa Murphy's location near you, visit
www.papamurphys.com





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MARKET REPORT

Weather

Hot temperatures are once again forecast to impact California this week as a high pressure system moves into the western states today. Temperatures in the 80s along the coast to the high 90s inland are expected through the week, with triple digit temperatures likely in the warmest areas. Record high temperatures are a possibility this week throughout the state, especially in the interior regions.

Rains and thundershowers will continue to impact the southeastern growing regions this week following heavy rains last week and over the weekend. Flood and flash flood watch and warnings remain in affect in parts of Alabama, Tennessee, Georgia and Florida the front part of this week as heavy rains continue. The latter part of the week will see the active weather pattern continue in the various areas with showers and thunderstorms expected (heavy at times) throughout this week. Temperatures in the high 70s to the north to high 80s in the southern regions with lows in the 60s will be the norm this week.

ITEMS TO WATCH -- MARKETS VOLATILE, PRICES UP

Avocado Berries Grapes Kiwi Honeydew Tomatoes

ITEMS TO WATCH -- MARKETS GOING DOWN/STEADY

Apples Asparagus Bell Peppers Broccoli Carrots Cauliflower Celery
 Citrus Cucumbers Green Onions Leaf Lettuce Iceberg
 Cantaloupes Onions Pears Potatoes Squash Stonefruit

APPLES/PEARS

An interesting year is shaping up in the Northwest as the new crop Washington Apples get going. Small sized apples in ALL varieties are in a demand exceeds supply situation right now as the apples are coming off large (peaking on 88's and larger). Red Delicious supplies continue tight in Washington, and will remain so until more of the new crop fruit starts to be packed. Washington is packing more of the Honeycrisp apples this week but they are in heavy demand and supplies are light. California Granny Smith apples continue to be packed decent supplies are available again this week and there are now California Fuji and Braeburn. There are other areas in the Northeast (including Michigan and New York) going on red 'typed' apples, and demand for those is very good as well, especially in the small sizes or lack thereof. Gold apples are extremely tight right now as well with the transition from early Gold varieties and the new crop Gold Delicious. Anjou Pears are going with better supplies in Washington this week and Bartlett pears are still going strong. California Bartlett Pears will be finished this week.



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ASPARAGUS

The market for Mexican product has eased up slightly on large and standard sizing due to competition from Peru. Jumbo sizing however has increased in price as availability is extremely limited. Peruvian production out of the southern region has strong numbers on most sizing. Jumbos are moderate in availability.

AVOCADO

Mexico is getting heavy rains. Harvest has slowed. Chile is going with good supplies, but not heavy enough at this time to make up for Mexico's drop. Up coming, we are still looking at good steady supplies. We are at early-season maturity levels from both countries, so ripening will take longer and checked boarding will be a problem. This will improve as maturity levels get higher over the next two months.

- **Mexican Fruit:** Supplies continue to look to remain lighter for a while. Heavy rains are slowing harvest. Mexican growers are being cautious about moving fruit that does not have the maturity levels needed. This looks to be only a temporary situation.
- **California Fruit:** Next years crop looks much larger than this year's, and should be ready to begin late December / early January.
- **Chilean Fruit:** Chilean fruit supplies are steady; smaller sizes still the peak volumes and larger sizes are improving. Fruit has early season characteristics, but will steadily improve in eating quality as we get further into the season.

BELL PEPPERS

Eastern Bells: As the Northern most growing regions begin to wind down the southern regions will begin harvesting. Pepper will most likely remain at current levels for the remainder of the week as Michigan will go until the first frost and Georgia will begin picking at the end of the week.

BERRIES

- **Strawberries:** Production this week is starting low with multiple challenges. Quality is the factor of declined production as shippers are leaving a good portion of fruit in the fields. The weather forecast is calling for a warming trend to set in starting today with temps reaching into the mid to high 80's. The increased temps right after the rain is a bad combination, further stressing the fruit. We can expect to see softer, over ripe and bruised fruit. Oxnard is right around the corner with new crop that should provide some relief for availability and certainly better quality.
- **Raspberries:** Raspberry production has tightened up slightly. Production is currently inconsistent, but quality remains good. There is Californian production in Watsonville and some in the southern areas. We can expect some light production out of Oxnard by the end of September.
- **Blackberries:** We are continuing to see irregular local California production in the Salinas and Watsonville areas, but are expecting a bit of a decline. Mexico and Guatemala are sending fruit up but are not sending enough fruit up to ease the demand, but we may see an increase from Mexico within a week. All growing areas have slowed.
- **Blueberries:** Oregon and Washington are done, Northwest shippers will be using Controlled Atmosphere fruit. There are still good quality and supplies in Michigan. Things are becoming tight and we can expect this trend until we start to see the offshore fruit arrive around late September. We can expect to see higher fobs.

BROCCOLI

This market is stable. Most suppliers to start the week have moderate to good supplies on both bunched product and crowns. Slightly better pricing can be seen out of the Santa Maria region but prices are firming up. This market looks to get stronger towards the end of the week. The quality of the product continues to be good.

CARROTS

California carrots are coming out of Bakersfield with good supplies and quality.



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CAULIFLOWER

This market has not changed from the previous week. Supplies are strong, mainly on twelve sizes and deals can be made on volume orders. Santa Maria and Salinas continue to be the main areas of production. Pricing is competitive in both areas.

CELERY

This market is getting stronger and the pricing is tightening up with all suppliers. The availability continues to vary. Some suppliers are stronger on 24 counts while others are heavy to 30s and 36 counts. Supplies are coming out of the Salinas and Santa Maria growing regions. The quality continues to be strong with no major issues to report.

CITRUS

- **Lemons:** Supplies of large sizes continue to tighten. Availability continues to look good on 115's and smaller.
- **Limes:** Supplies have improved this week as rains have subsided in growing areas. Sizing on pack outs are still running to smaller and mid sizes. Large sizes (110's and 150's) still limited. Demand is good. Quality remains good, with lighter color which is a characteristic of the summer crop.
- **Oranges:** Demand is very strong, and demand continues to exceed supplies on 88's, 113's and 138's and expect it to stay this way until navels start. Navel crop is 16% larger than last years crop, but is still lighter than average. Anticipated start of Navels is mid to late October.

CUCUMBERS

Eastern Cucumbers: The Michigan and New Jersey deal is finished on cucumbers but Georgia and Tennessee are into good volume with excellent quality. Minimal demand will keep the market down for another several days.

GRAPES

The Central Valley continues to fight issues with lack of color in the Red Seedless varieties as well as heat in the vineyards. The daytime heat is taking its toll on available volumes and nighttime temperatures are not cooling down enough to allow for proper coloring. Supplies are very sporadic right now on red seedless grapes and there are only light supplies available compared to the current demand. Green seedless are on the last storage supplies for 19# cases and will quickly be switching to 16# units of which are considerably more expensive. Demand looks to remain strong for both red and green seedless, and supplies will remain light all week. The market will also continue stronger and most likely remain strong for the balance of the storage grape season.

GREEN ONIONS

This market remains stable with pricing. Supplies are moderate with most suppliers. This market continues to be in double- digits with all suppliers. Pencil sizes are still the largest volume available. The quality continues to be good with no significant problems to report.

KIWI

New Zealand Kiwi will remain light into next week and the Chilean Kiwi is finishing fast. The market continues strong to finish the week with stronger demand and lighter supplies.

LEAF LETTUCE

There is a good availability of both romaine and romaine hearts. Issues continue to exist with some lots having issues with fringe burn. Suppliers have indicated the fringe burn problem this week will be less an issue compared to previous weeks. Green and red leaf is stable as we head into the weekend shipping. Most suppliers are expecting good availability on leaf items throughout the week.

LETTUCE

This market has softened. Many suppliers have started the week with good supplies, and are looking to move load volumes. Pricing continues to be competitive in both the Santa Maria and Salinas growing regions. Supplies look to be good throughout the week.



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MELONS

- **Cantaloupes:** As predicted the heat is on again in the Central Valley, but there are still good supplies of quality cantaloupes and a wide range of sizes are available to start the week. Heat is expected to continue through the entire week and could size the fruit down again further. Peak sizing is still on 12's and 15's with only light supplies of 9ct. There continues to be regional cantaloupes available, but only in light supply and not in demand like the Westside deal. The market is still weak on the smaller sizes, but remains somewhat active on the large sizes (9ct)* and looks to remain that way for the rest of the week. Fruit quality remains good with decent sugar levels. Look out over the next 10-14 days as few shippers will finish early and the market could get very active.
- **Honeydews:** Honeydew supplies are a touch lighter this week, but demand is not there to create a stronger market. As the week progresses and also moving into next week supplies will continue to lighten up and few shippers will finish by the first of October. There is still a wide range of sizes available. Quality continues to be good in honeydews.

ONIONS

Idaho/Oregon continues with very good availability this week on red, yellow and whites. Quality is good and it looks like there will be good supplies throughout the season. Fresh harvest for some supplies will finish earlier than anticipated and they will begin their pull out of their storage supplies a little earlier than usual. Huron is done for the season. Washington supplies are very good with good quality as well. There are supplies available out of Colorado and Utah.

POTATOES

New crop Norkotahs are going strong with good quality. There are some Ranger, Western and very light supplies of Burbanks available. Depending on the shipper there are some that are into larger product and some are now into smaller Norkotahs which has leveled out the prices. Washington new crop Norkotahs are going strong with good quality and availability. Colorado is going strong with new crop supplies as well. Northern California has finished up for their season. Southern Washington is going with good availability on reds and yellows. Mount Vernon, Washington with good availability this week; product quality as usual is stellar.

SQUASH

Eastern Squash: This week will see the end of squash supplies out of the north. With Georgia into good volume now we will continue to see this market drop. Quality is good on the Georgia product right now but rains rolling through the area may lead to issues later next week.

STONE FRUIT

Red Plums are finishing their supplies and volume is now concentrated to only the large sized fruit (60's and Larger)*. Black Angeleno Plums continue to dominate the plum market and there seems to be a good size range available. The market on all plums remains strong. Peaches remain in light supplies. Demand is still very strong and the market continues at the higher levels. Nectarines are steady again this week, but there are deals available on the large sized tray packed fall varieties. Washington is still only producing light volume on Peaches and Nectarines.

TOMATOES

Eastern: The market is reacting to current weather pattern setting in the east. The forecasted rain will slow harvests. There is cooler weather in the northern areas and this is bringing their season to an end soon. Supplies are going to diminish within two weeks for MI, OH and PA. Florida is expected to begin in about two weeks.

WATERMELONS

Regional Watermelons are still available, as well as light volume out of Northern California, but supplies continue to drop off. What is left for California volume will drop off again over the next week to 10 days. Mexico is slated to start in mid-October. Markets remain strong and demand strength continues as well. Quality is very good for all available regular and personal sized watermelons.

VALUE ADDED

The raw materials like lettuce and romaine continue to have some issues of fringe burn. There have been some issues on chopped romaine breaking down too quickly. Broccoli processors are steady with supplies and availability. Complaints have been minimal on green onions, and production numbers should increase this week.