



THINGS YOU SHOULD KNOW:

Green bell peppers remain very short and quality is only fair. Red and yellow bells are also becoming very tight

Bartlett pears are finished for the season

Nappa cabbage is still extremely light in availability due to excessive seeder in the fields



The Source

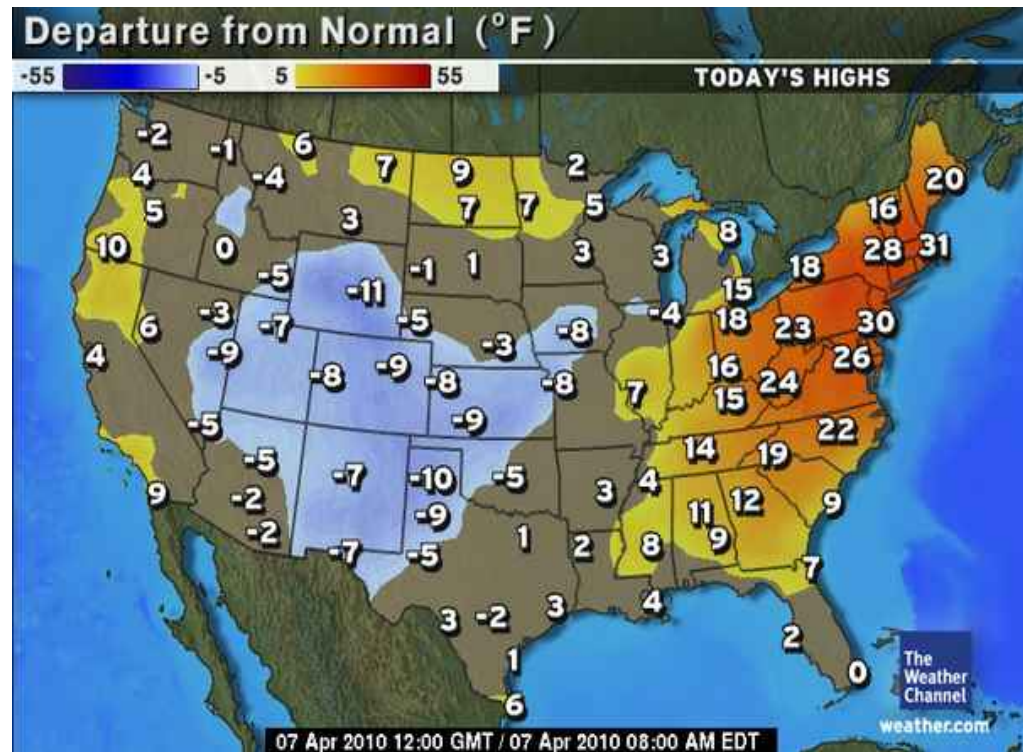
April 7, 2010

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Weather: *Tim Lynch*

High pressure building over California today will bring sunny and dry weather with warming temperatures to the western growing regions the latter half of the week. This will be a welcome relief from cold rainy conditions of late. Temperatures in the high 60s to low 70s are expected through Friday. Mid range forecasts show another storm system approaching California over weekend bringing cooler temperatures (Low 60s) and a slight chance of rain. Current forecasts bring this system in to the south of the Salinas Valley impacting Southern California with showers Sunday and Monday.

A strong high pressure system over the Gulf of Mexico will slowly slide east through the week. This will keep the Southeast high and dry with warm temperatures, into the mid 80s into Thursday. A cold front moves through the area late this week bringing a slight (20%) chance of showers on Friday.



Freight: *Mike McIntire*

The availability of eastbound trucks in California and Idaho remain fairly tight. Apple trucks in Washington remain steady. Crude oil prices are currently at \$86.04. The diesel price for this week is up .076 cents to 3.015.

Commodity Updates

APPLES/PEARS *John Tole*

Washington shippers still need help moving large reds and gold's especially in the higher grades. Smaller foodservice reds and gold's are still very limited. Granny-Smiths are still short on the larger fruit and lower grades. Export demand from Mexico is up and supplies of the smaller Gala variety are lower as the smaller shippers finish packing this month. As Gala supplies drop the deals on the smaller varieties will dry up as well. There are still some tremendous deals on 48/56/64's in most varieties as most are large and heavier to the premium grades. Please consider varieties other than red delicious for your foodservice orders that require small fruit. D'anjou pears are in excellent shape with good supplies in Washington and are also mostly large. Bosc, Seckel, Concorde, Comice and Red Crimson varietal pears are available as well although supplies are low as the varietal pears finish for the season.

ASPARAGUS *Gabe Romero/Mike Pacheco*

This asparagus market is different among suppliers. There are shippers having tighter availability than others. This market overall is stable. Supplies are light out of Washington. Mexico product will start to wind down in all areas except the Baja region, where production will continue through the month of March. California production continues to produce better production numbers. Peruvian product is still available on the East and West Coast. Quality of Mexican product continues to be good.

AVOCADO *Tim Kelley*

California growers continue to improve their harvest volumes. Fruit is beginning to size up. Mexico's volume is lighter as growers continue to hold off on production.

Mexican Fruit: Growers continue to slow their harvest to firm their market and with California coming in with better volume the Mexican supplies will lighten up.

California Fruit: Growers are harvesting good supplies as fruit is sizing up. Demand is good.

BELL PEPPERS *Tim Kelley*

Western Green Bells and Colored Bells:

Mexico continues with light supplies on green bells. There are a few growers beginning to

Commodities at a glance...

<u>Commodity</u>	<u>Quality</u>	<u>Market</u>
Apples	Excellent	Steady
Asparagus	Good	Steady
Avocado (Mexican)	Good	Steady
Avocado (California)	Good	Steady
Bell Peppers (Western)	Fair	Lower
Bell Pepper (Eastern)	Fair	Lower
Berries: Strawberries	Fair	Higher
Berries: Raspberries	Good	Higher
Berries: Blackberries	Fair	Steady
Berries: Blueberries	Fair	Higher
Broccoli	Good	Steady
Carrots	Good	Steady
Cauliflower	Good	Steady
Celery	Good	Steady
Citrus: Lemons	Good	Steady
Citrus: Oranges	Good	Steady
Cucumbers (Western)	Good	Lower
Cucumbers (Eastern)	Fair	Lower
Grapes	Good	Lower
Green Onions	Good	Steady
Lettuce: Leaf	Good	Steady
Lettuce: Iceberg	Good	Steady
Melons: Cantaloupe	Good	Lower
Melons: Honeydew	Good	Lower
Onions	Good	Higher
Pears	Excellent	Higher
Potatoes	Good	Steady/Higher
Squash (Western)	Good	Lower
Squash (Eastern)	Good	Higher
Stone Fruit	Good	Steady
Tomatoes (Western)	Good	Steady
Tomatoes (Eastern)	Fair	Steady
Watermelon	Good	Lower

Commodity Updates *continued*

harvest new fields, and other growers stretch out the harvest of the last of their crop over the next two weeks. Florida has started in a very light way and should increase slightly over the next few weeks. The California desert looks to begin the 3rd week of April. Red and yellow bells from Mexico have become extremely limited with the harvest of these fields in the green stage to fill green orders, coupled with many growers winding down for the season. The California desert crop for colored bells will start early to mid May. One grower in Baja looks to start with a few colored in 1 to 2 weeks.

Eastern Bells: *Janine Baird*

The market has dropped on Florida bell pepper, particularly in the off grades. Volume is up a bit but nowhere near where it should be for this time of year. We are still a good 2 weeks away from ample supplies so the market could hold at this level or even go back up a bit in the coming weeks.

BERRIES *Mike Gorczyca*

Strawberries: California received anywhere from a .50 inch to 1 ½ rain in the Strawberry growing areas Sunday/Monday of this week. This has tightened up supplies and firmed the market up a little the start of this week. Quality is fair due to the weather. Quality will improve in the next 4 to 7 days. Florida strawberry growers are done for season for the most part. What they are still harvesting is best kept in Florida.

Raspberries: Supplies are very light with a firm market the start of this week. Supplies will slowly improve by the middle of next week. Quality is good. Driscoll is still the main supplier of raspberries at this time.

Blackberries: Better supplies coming out of Mexico is causing this market to weaken slightly. Quality is good.

Blueberries: Supplies are light with a stronger market. Demand is good. Quality is fair to good.

BROCCOLI *Gabe Romero/Mike Pacheco*

This market is firm to start the week. There are ample supplies that currently exist in Salinas, Santa Maria and there is still a little production in Arizona. The heads sizing on crowns has been much better as good weather has been

had for this past week. Rains this past weekend will slow production to start the week on all broccoli items.

CARROTS *Tim Kelley*

California carrots are coming out of Bakersfield for the next week or two weeks with good supplies. Yield and quality are good and there should not be any gaps for the next couple of months.

CAULIFLOWER *Gabe Romero/Mike Pacheco*

This market is steady from last week. The best pricing continues to be out of the Salinas region. Santa Maria will have production as well. There has been little to no complaints on quality this past week. Good supplies are forecasted this week which will keep pricing competitive.

CELERY *Gabe Romero/Mike Pacheco*

This market is slightly lower on large sizing 24s in particular. All other sizing is stable. Production is stronger in Oxnard. The quality continues to be good in terms of color and texture. There is no product available in Salinas at this time.

CITRUS *Tim Kelley*

Lemons: Supplies are good on 115's and larger, with 165's and 200's in fair supply. Quality is very good.

Limes: Limes are very short and expect them to stay short until mid May when the new crop is expected to start.

Oranges: Demand remains steady. Crop continues to peak on fancy 72's, 56's and 88's.

CUCUMBERS

Western Cucumber: *Tim Kelley*

Mainland Mexico production is increasing, with good supplies this week and continuing over the next 2 to 3 weeks. Baja growers are breaking new fields and will increase production over the next few weeks.

Eastern Cucumbers: *Janine Baird*

The off shore deal in Florida is finished. There are steady supplies of domestics and the market is trending downward. However, the beginning of the spring cucumber shipments means possible issues with color and sizing. Quality and volume will improve in the coming days with plenty of fair weather in Florida's

Commodity Updates continued

forecast. This market should continue its downward trend.

GRAPES *Amy Grolnick*

Demand is still light and shippers are looking to keep product moving with deals on both coasts. There is Crimson, Rubies and still some Flames available. The Greens, Sugarones and Thompsons are still the most prevalent. Black seedless is in lighter supply and excellent quality. Red Globes with very good quality and good availability.

GREENONIONS *Gabe Romero/Mike Pacheco*

This market is showing some strength. Mexico had an earthquake this past weekend and it seems to be causing a problem with Labor. Green Onion crossings will start to tighten up. The supplies are out there but with the lack of labor to harvest everything supplies will be limited. Pencil sizes continue to have the largest availability. There continues to be a few issues on light yellowing on processed items.

LEAF LETTUCE *Gabe Romero/Mike Pacheco*

The leaf market is steady. Huron and Salinas are in production, and product will be available in Yuma if needed. Huron is seeing small insects at harvesting time. This issue will likely continue through the week so please be aware. Heavy rains over the weekend will cause for delays in loading to start the week.

LETTUCE *Gabe Romero/Mike Pacheco*

This market continues to be steady. Production numbers have increased in Huron. Some small insects have been seen on lettuce in Huron and this will continue to be seen throughout the week. Yuma has some production through this week if the need arises. The sizing is up and down in consistency with small and misshapen heads seen in all the growing regions. There continues to be a few issues of pink ribbing, discoloration, and mechanical damage seen upon arrival.

MELONS *Amy Grolnick*

Cantaloupe: Better availability with less demand. Honduran and Guatemalan product are both coming into the US. Product is coming into Pompano and Manatee, Florida. There is product on the West Coast out of the

LA area and some fruit coming into New Jersey as well.

Honeydew: Much better supply after the holiday with shippers willing to make volume deals. Offshore fruit is still arriving into Florida, California and New Jersey. Product quality is getting better. Nogales is receiving Mexican fruit with better availability and quality.

ONIONS *John Tole*

The Oregon/Idaho market is steady on yellows and reds. Each week that passes more shippers finish so supplies are in fewer hands but it hasn't affected the market yet. Expect the market to stay strong and be ready for price increases since the Texas and Mexican product is small! The remaining northwest packers continue to manage their storage inventories to insure supplying regular and contracted customers. The northwest yellow sizing remains heavy to jumbos and larger with few mediums and fair to good quality depending on the shipper. Whites are still very limited and in a demand exceeds supplies situation but the market has stabilized. The Mexican and Texas onions are peaking on mediums and pre-packs in all three colors, so the volume of jumbos is very low and colossal and larger are even tighter. The quality from Mexico has been good to fair on all colors. Texas will have more product later this week but the onions will continue to be small and the low yields will continue so expect supplies to remain limited on the larger sizes.

POTATOES *John Tole*

Idaho remains limited on the larger counts while the smaller sizes are abundant. Burbanks will be the main variety for the rest of the storage season and will continue to peak on 80/90/100's. Idaho norkotahs are heavier to 60's and 70's but are in very few hands and most shippers that still have them will finish by the end of April. Washington norkotahs are steady on all counts although they are very limited on 90's and smaller. They still have excellent quality and are peaking on 70's and 60's. Wisconsin and Colorado shippers are also packing norkotahs. The Colorado market is steady to slightly stronger. Wisconsin is coming to the end of the season and is higher on all sizes due to lighter supplies. The quality

Commodity Updates continued

in Colorado is mostly good while Wisconsin ranges from poor to good. Mount Vernon, Washington continues with excellent quality on reds but is done with Yukon-gold's and will only have reds for a few more days. North Dakota continues to pack reds and golds but the availability is way down and they are pricing day-of-shipment. Idaho packers are going with reds and golds as well but the demand is very strong and they are pricing day of shipment. California packers continue to pack all colors and are getting increased volume now. South Florida is going with reds and yukons and the volume is up so they are more of a player now. Red supplies are down overall and the market is strong for sure so stay ahead.

SQUASH

Western Squash: *Tim Kelley*

Mexico production is good with increasing supplies. Baja is now expected to start mid April. Fresno, California could start their spring crop by mid April also.

Eastern Squash: *Janine Baird*

The squash market is on its way back up in Florida. Recent heavy rains have led to quality issues and decreased volume. Expect green and yellow to hold at the current level for the next few days.

STONE FRUIT *Amy Grolnick*

Off shore Peaches, Nectarines and Plums are all available with good quality and availability.

TOMATOES *Ryan Frayo*

Eastern: Florida has a few shippers getting a little stronger with production, anticipating some fruit to become available from what very light production there actually is. Shippers continue saying possibly the middle to the end of May before supplies increase to normal production levels. The couple of shippers who are coming up with some fruit have quantities that are small and insignificant in the big picture. There have been considerable quality issues with the Florida fruit such as scaring and misshaped fruit. As mentioned volumes will continue to be less than normal, but quality should improve as growers continue to pick and clean up the plants. Roma tomatoes are coming on fairly strong with Grape and Cherry tomatoes right

behind them. We can expect to see higher than normal fob's on the round tomatoes probably up through the spring accompanied with shortened supplies.

Western: Supplies out of San Diego continue to be low and diminished with a strong Mexican market. Nogales on the other hand has dropped prices on all tomato varieties. The driving force on the easing pricing is that demand has eased up a bit and production has stabilized but there is a wide range of pricing due to some of the major shippers having an excess of inventory so some are dropping prices more than others, leaving an uneasy feeling about the market. Production should remain steady (weather permitting) for the next few weeks.

WATERMELON *Amy Grolnick*

Better supplies on both seeded and seedless product with the holiday pull over and better volume coming in. Also quality is better. The mini seedless are in better supply and quality is good, the market is lower.

VALUE ADDED *Gabe Romero/Mike Pacheco*

On value added items, production is going strong in Salinas. Taylor Farms will be in Yuma through this week, and then will start up in Salinas on Monday the 12th of April. Shippers are prepared to take on extra business if truck logistics become a factor so please be aware.