



THINGS YOU SHOULD KNOW:

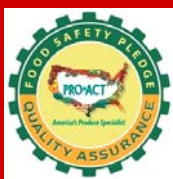
Red and Gold Bell Peppers remain very short in supply

Italian and Yellow squash remain very limited in availability.

Bartlett pears are finished for the season

Strawberry quality is fair and supplies are tight

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



The Source

April 28, 2010

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Weather: *Tim Lynch*

A fairly powerful winter type storm system will move into California tonight bringing another round of rain to the region over the next couple of days. This cold system will bring winds, rain and cool temperatures California with precipitation likely to impact Central California and to the north with a slight chance of showers expected in Southern California. Current forecasts are unclear about the exact track and moisture content of this system at this point but numerous growing regions are in the line of fire. Cool temperatures in the low 60s are expected through the week as this system moves out of the area mid week.

A low pressure system and cold front will slide southeast through Florida today. This will bring the southeast a slight chance of showers and breezy conditions through Tuesday. Clearing skies along with warm temperatures, into the mid 80s are forecast into the weekend. A slight (10%) chance of light showers is possible late in the week.



Freight: *Mike McIntire*

The availability of eastbound trucks in California and Idaho has loosened up slightly but expect things to tighten up towards the end of the week. The TX valley is extremely tight right now. Apple trucks in Washington remain steady. Crude oil prices are currently at \$83.16 remaining steady from last week. The diesel price for this week is up slightly to \$3.078.



Commodity Updates

APPLES/PEARS *John Tole*

Washington shippers are still peaking on large reds and golds. Both markets are steady but strong now that the varietal numbers are lower. Small foodservice sizes remain very limited in all grades and will get even tighter as the eastern apples dry up. For your orders that require small fruit please consider varieties other than reds since they are so large. Granny-Smiths are still short on the larger fruit and the lower grades. Export demand from Mexico remains strong and they are buying much of the cheaper fruit. There are still some good deals in most variety's on 48, 56, 64 size fruit. Braeburns, Galas, Fuji's, and Pink Lady varietals are left although the Pink Lady and Braeburn numbers are low, while Cameos, Jonagolds, Honeycrisp, and Romes are finished for the season. D'anjou pears are in excellent shape but supplies in Washington and are lower and the prices are up. Expect domestic fruit prices to climb. Washington fruit is mostly large. A few Red Crimson and/or red D'anjou pears are available too but supplies are very limited.

ASPARAGUS *Gabe Romero/Mike Pacheco*

The asparagus market is active. Mexico production is light. Supplies are also light out of Washington. Peruvian product is still available on the East and West Coast. Expect supplies to be light out of California throughout the week. Rain on Tuesday and Wednesday has slowed production down in California.

AVOCADO *Tim Kelley*

California harvest continues at a steady pace. Fruit pack outs are running to smaller sizes. Mexico's volume is lighter as growers continue to hold off on production. Cinco De Mayo demand pull is keeping markets firm.

Mexican Fruit: Growers continue to slow their harvest to kept prices firm. Mexico is crossing limited numbers of 48ct and larger fruit.

California Fruit: Growers are harvesting good supplies, but the pack outs are heavier to 60's and 70's. Demand is very good.

BELL PEPPERS *Tim Kelley*

Western Green Bells and Colored Bells:

Mexico supplies are quickly winding down as their season comes to the end over the next 2 to 3 weeks. Availability, size, and quality

Commodities at a glance...

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

Commodity Updates *continued*

continue to drop. The California desert has started harvesting green bells in light volume and will continue to ramp up production over the next 2 weeks. Red and yellow bells from Mexico are extremely limited, as they are coming to their season end. The California desert crop for colored bells will start early to mid May, with volume by the first week of June. One grower in Baja has light supplies of new crop colored bells.

Eastern Bells: *Janine Baird*

The pepper market has tightened back up a bit, mostly in the larger sizes. Rain and wind in Florida's growing areas have led to decreased supplies. Even with the Spring crop kicking in, we may see the market creep up a bit as Nogales winds down and the demand on Florida pepper increases.

BERRIES *Mike Gorczyca*

Strawberries: We are currently in a very challenging situation with strawberries the middle of this week due to wet weather hurting supplies and heavy demand for Mother's Day. Shippers are sold out into the start of next week and are in a fill rate situation. Quality is problematic with white shoulders, green tips, bruising, pin rot, mold and water damage likely to be prevalent in the packs. This situation will ease up the middle of next week once the Mother's Day demand finishes. The only good news is no rain in the forecast after today for at least the next 10 days. Market is firm.

Raspberries: Supplies are slowly improving each week. Market is slightly weaker with good quality.

Blackberries: Good supplies and demand is causing a steady market. Quality is being reported as good.

Blueberries: Chile is done for the season. Florida has started with light supplies and a firm market. Quality is good. California will start later this week with light supplies. Look for this market to weaken quickly over the next two weeks as Florida and California build volumes.

BROCCOLI *Gabe Romero/Mike Pacheco*

This market is softer on bunched product and stronger on crowns. Overall, supplies are on the light side, especially in the Santa Maria and Oxnard growing regions. Bunched broccoli is more readily available in Salinas.

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 continues to be active with all suppliers. The past rains and lack of product in the field has made this commodity very tight. Expect availability to be very tight throughout the week. Santa Maria will have little production for the week. Expect pricing to be very active throughout the week.

CELERY *Gabe Romero/Mike Pacheco*

This commodity is stronger in the marketplace. Celery supplies will be lighter this week as we start to see more seeders in the larger size celery. Supplies are coming out of Oxnard predominantly. The quality continues to be good in terms of color and texture. Salinas looks to start production by mid June.

CITRUS *Tim Kelley*

Lemons: Demand is steadily increasing, pricing remains steady. Quality is very good.

Limes: Rains have cleared and expect better supplies this week, but expect them to stay lighter in volume until mid May when the new crop is expected to start.

Oranges: Rains has hampered harvest over the last few weeks. The supplies of harvested fruit are light and may continue the way through this week as more rains are projected. Demand is strong and pricing has firmed up. Crop continues to peak on fancy 72's, 56's. Demand exceeds supplies of 88's and smaller sized fruit. There are some Valencia's being packed the help fill the shortages on the small sizes. Shipper plan to begin packing Valencia's on a regular basis by mid-May.

CUCUMBERS

Western Cucumber: *Tim Kelley*

Mainland Mexico production is good. Baja growers expect good production through the month.

Eastern Cucumbers: *Janine Baird*

The cuke market has remained steady for the past couple of weeks but has recently started to decline. Quality is good now but look for rain related issues in the next several days.

Commodity Updates *continued*

GRAPES *Amy Grolnick*

Chilean storage green grapes are the best quality but only fair at best. The greens will lessen and may have a slight gap prior to the start of the perlettes. There are Crimson and some Rubies still available with good volume. Black seedless is in lighter supply with excellent quality. Red Globes with very good quality and good availability.

GREEN ONIONS *Gabe Romero/Mike Pacheco*

This market is stable. Labor issues are in better control in the wake of the recent earthquake. 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 overall is steady. Good supplies exist on romaine but green leaf is light in supplies. Rains are expected today which will only cause delays in harvesting. We are still seeing red discoloration in all leaf items due to the previous rains that we had here in Salinas.

LETTUCE *Gabe Romero/Mike Pacheco*

This market is softer. Huron is finished with lettuce. Salinas is in full swing with production. The weights have been much better, averaging 45-46 pounds on palletized lettuce. Some issues of pink ribbing, discoloration, and mechanical damage are still seen upon arrival. Suppliers are willing to make offers on load volume orders for the rest of the week.

MELONS *Amy Grolnick*

Cantaloupe: Availability of offshore product is beginning to lighten up as shippers are starting to clean up on Honduran and Guatemalan product. Mexican product is now crossing into Nogales, sizing is running small but quality is good.

Honeydew: Lighter supplies of offshore product as shippers finish up in Honduras and Guatemala for the season. The west coast is very limited and will remain tight for the next few weeks. Nogales is receiving more supplies of Mexican fruit with good quality and sugars.

ONIONS *John Tole*

The Texas market is lower on yellows and whites but steady to higher on reds. Supplies are still somewhat limited esp. on reds, but the weather has been warmer and dry. They are

not forecast to get any rain until the middle of next week and then it's only a chance so the packing outlook continues to be good. The weather has brought larger sizing on all colors. There is still a good percentage of mediums and smaller but the jumbo and larger numbers are definitely up, and the quality is better. Red supplies are still tight so continue to stay ahead. Vidalia, Georgia continues packing and they have better numbers of jumbos than they thought originally. The Vidalia quality has been good. California continues packing yellows with a few reds and a few whites. The numbers are still relatively low but will improve as the week goes on esp. on yellows. The yellow market is also down in California. Red and white volume will be up next week as more shippers get started. The quality and size have been good.

POTATOES *John Tole*

Idaho is still packing lots of small potatoes and the price-gap between large and small is widening. 60 count and larger are so tight that many shippers are asking for 48 to 72 hours lead-time to cover orders. Burbanks are the main variety and the norkotahs are almost done. The remaining norkotahs are still peaking on 60/70's. Washington norkotahs are steady to slightly higher on all counts and are very limited on 90's and smaller. Washington is still peaking on 70/ 60's and has excellent quality. Wisconsin is higher on all sizes with light supplies since they are almost finished for the season. Their quality is fair. Colorado is up on the larger sizes along with demand. The quality in Colorado is mostly good. North Dakota continues to pack reds and golds but the availability is down and they are almost finished. Their quality is poor to good. Idaho has a few reds and golds left but the supplies are light. California packers are still packing all colors and have better numbers from Bakersfield. The California quality is good on all colors. South Florida is still running reds, yukons, and whites, and have good volume especially on reds. They also have good quality and their reds are very dark in color.

SQUASH

Western Squash: *Tim Kelley*

Mexico production is very inconstant in volumes and quality. Expect better production on Italian squash over the next 10 days. Yellow

Commodity Updates continued

has a lot of problems in the field and increased production is still a ways away. Baja has started very light production. Fresno, California is cleaning their fields this week.

Eastern Squash: *Janine Baird*

With more heavy rain and strong winds hitting South Florida, this market has started to decline. Central Florida should be getting into some decent volume in another week or so but in the meantime look for rain related quality issues and limited supplies out of South Florida.

STONE FRUIT *Amy Grolnick*

Off shore peaches, nectarines and plums are all available with good quality and availability. Domestic cherries will start up around the first week of May. There will also be some light volume starting on the domestic tree fruit the first week of May.

TOMATOES *Ryan Frayo*

Eastern: Florida continues to have shippers getting a little stronger with production, 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. There has been no change in quality to date. Coming on fairly strong are Grape and Cherry tomatoes. We can expect to see higher than normal fob's on the round tomatoes probably up through the spring accompanied with shortened supplies. The Roma tomato production is getting better with respectfully lower fob's compared to weeks previous.

Western: Supplies out of San Diego are low and production in the new regions is not up to speed yet. We can expect this trend up until the new Baja crop gets ramped up in late May into the front of June. Nogales is a bit unstable with pricing. We can expect to start seeing less and less fruit out of Nogales as we are seeing the beginning of the end down there. Quality will be

the first indicators as how quick it will wrap up. Weather has been favorable in Baja with no major issues. California is on track to get going around the second week of June.

WATERMELON *Amy Grolnick*

Better supplies on seedless product with seeded watermelon in light supply. Prices are still at the bottom. The mini seedless are in better supply and quality is good, the market is flat.

VALUE ADDED *Gabe Romero/Mike Pacheco*

On all value added items, production continues to be going strong in Salinas. Expect some discoloration on romaine and lettuce items upon arrival. Product quality has been up and down on lettuce.