



The Outlook

March 24, 2009

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Transition/Crop Outlook

A high pressure ridge out on the West Coast will keep the western growing regions dry with a gradual warming trend through the week. Temperatures slightly above average (60s to low 70s along the coast, 70s inland and 80s in the desert) are expected the latter part of the week into next week. The expected weather pattern will be beneficial to growth rates throughout California's transition and spring acreage. Hot temperatures, possible in the desert region next week, may cause problems as these late season desert supplies are susceptible to heat stress as temperatures heat up.

As lettuce harvests wind down seasonally in the desert region and begin the transition through Central California supplies will vary by shipper and growing region. Supply gaps are not anticipated at this time (due mainly to lighter demand) but intermittent production shortages are typical during the transition to spring acreage. As temperatures heat up in the desert region production and yields may become inconsistent from field to field causing growers to abandon stands. Seeders, sun discoloration, growth crack, fringe and tip burn and lesser textures are typically associated with these hot temperatures. Romaine and leaf production face the same challenges as temperatures warm. Desert growers will attempt to prolong production as long as temperatures remain favorable for quality. Current quality remains generally good at this time in the mild temperatures.

Cauliflower and broccoli production, especially broccoli crowns will remain light for the near term at a minimum. Desert area growers ahead of schedule most of the winter will quickly wrap up production. New crop supplies from Central California remain behind schedule due to growing conditions with current yields on the low side. The current varieties (winter planted, open variety) are susceptible to sun damage as the crowns remain open (not covered by large leaves). Warm days in January and February (numerous near record high temperatures were recorded) have impacted yields and quality. Purple cast, spread and bolting in broccoli along with sun discoloration, off color and ricing in cauliflower stands have lowered yields of these new crop supplies.

Bean supplies will remain limited over the next few weeks as production transitions north to new growing regions. Recent cool wet conditions in Florida and Texas have pushed harvest start dates back (10-14 days) as Mexico begins to wind down seasonally. Production from the desert region of California is expected to begin around mid-April. Upcoming weather patterns in the various growing regions will play a major role as to future supplies. Cucumbers will also remain tight for the near term as Mexico transitions to fields to the north over the next few weeks and supplies from Florida are anticipated to remain light into mid-April at this time.

Strawberry production from Southern California will soon be in full swing with the improving weather pattern. Good size and quality are reported as harvests increase seasonally. Santa Maria has started light production with Salinas set to begin in the near future.



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Blueberry supplies will remain very light as off shore (Chile) production quickly winds down. Domestic production from the east (Florida, Georgia) has taken a hit from the freezing temperatures in February with a 20-30% loss reported. This was the third freeze event in these regions this season. Most of the damage reported was done to the early crop which runs from mid-April to mid-May with only a 10% loss reported in the summer crop harvested in June and early July. Domestic production from California has been delayed by the recent cool wet conditions. Overall domestic production remains behind schedule due to the aforementioned adverse growing conditions this year. Production should begin to increase in the near future as the weather begins to cooperate.

We anticipate a bit of a roller coaster ride as to supplies and quality as growers harvest their acreage in the various growing regions. Supply shortages are typical during this period and the bottom line is you can expect lesser carton weights, quality and shelf life in these late season and transition supplies. Be prepared for possible loading delays. As always the upcoming weather patterns along with demand will be the determining factors as to supplies and quality. We will be closely watching the situation in the various growing regions and keep you up date as we gather more information.