

Commodity Updates

APPLES/PEARS

There are imported Fuji apples available loading in L.A. or the East Coast. CA Fuji Apples will not start until mid September. CA Gala Apples are going now with good supplies. Washington new crop Gala will start at the end of this week. Red Delicious supplies remain very tight. They continue to come out of storage in high color and peaking on 100's and smaller. Gold Delicious apples have finished with the storage old crop and are now packing light supplies in the Ginger Gold and Early Gold varieties. Washington Anjou and Red Pears are just about finished for the season. California Pears are going strong with the Bartlett variety and are looking to promote with volume on the smaller sizes. California Bosc, Golden Russet Bosc, European Bosc, Asian and Stark Crimson Pears are also going with good supplies.

ASPARAGUS

The market for Mexican product is active. Pricing is much stronger compared to Peruvian product loading out of Miami direct. Mexican grass is expected to be in light supplies on all sizes except small grades. Jumbo Asparagus supplies are still short.

AVOCADO

We are seeing the shift to imported fruit from Chile and Mexico. California is winding down their season, Chilean and Mexican supplies are improving.

Mexican Fruit: New crop crossings improving, with supplies of 60's and smaller in good volume. Please note that early new crop oil content will be low and require additional time for ripening.

California Fruit: California growers continue to pack light numbers, and many growers have finished with this years crop.

Chilean Fruit: Supplies of Chilean fruit continue to increase, mostly smaller sizes now, with larger sizes by the end of the month. Fruit has early season characteristics, but will steadily improve in eating quality as we get further into the season.

BELL PEPPERS

Western Green Bells and Colored Bells:

Supplies of green bells are lighter as we start the week. New growing areas along the coast are just beginning along the coast with very

Commodities at a glance...

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

Legend

Quality
Excellent
Good
Fair
Poor

Market
Steady
Higher
Lower

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light production. Look to increase over the next 7 to 10 days. The red and yellow bell production looks steady through the week.

Eastern Bells:

The pepper market is steady as Michigan and Ohio are in good supply with all sizing readily available. Quality is excellent and the market is expected to remain at the current levels for the balance of the week.

BERRIES

Strawberries: production this week has started snug again, with most to all shippers walking in sold out or only taking regular biz. The plants in the Salinas / Watsonville growing area are now past their "peak" production window. We are continuing to see overripe and bruised berries with many shippers quoting such defects at shipping point. Heavy volume continues not as abundant as the weeks previous. Santa Maria continues to produce moderate to low volume with good to fair quality. We have been experiencing very foggy damp mornings and relatively warm nights, which will contribute to the softer berry.

Raspberries: Raspberry production remains steady. There is not an abundance of fruit but shippers are doing fine covering orders. Quality has been good.

Blackberries: We are seeing irregular local California production in the Salinas and Watsonville areas but are expecting a bit of a decline, possibly until Mexico begins shipping again. All growing areas have slowed and shippers are cutting back orders. There are some off shore (Guatemalan) being flown in, but supplies are short.

Blueberries: Production In the Northwest has been disrupted as Oregon and Washington are done harvesting a bit early due to excessive heat. British Columbia continues to produce at a lower than normal rate due to some recent rain slowing things down. There are still good quality and supplies in Michigan. Things may become a bit tight until we start to see the offshore fruit arrive around mid September.

BROCCOLI

Supplies are better on both bunched and crowns to start out the week. Demand continues to be on the lighter side. Suppliers are very interested in keeping fresh product and are willing to be flexible on volume orders.

Broccoli crowns continue to be less in supply than bunched product. Sharper pricing continues to be seen out of the Santa Maria region. The quality overall continues to be good.

CARROTS

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

CAULIFLOWER

This market continues to be stable. Some suppliers have started the week with large volumes of product to sell and expect to be strong throughout the week. The quality has been better with less yellow and brown spotting seen upon arrivals. Santa Maria and Salinas continue to be the main areas of production. Pricing is competitive in both areas.

CELERY

Supplies are still strong with most suppliers. The 24 counts continue to have the largest volume, but all sizes are abundant to fill orders. Deals still can be made on 24s in particular on load volume orders. Michigan continues to have production. The supplies from this region should be good thru the week. The quality continues to be strong in all growing regions.

CITRUS

Lemons: Supplies of large sizes continue on the tight side. Availability continues to look good on 140's and smaller. Summer demand continues to keep prices firm.

Limes: Sizing on pack outs are running to smaller sizes. Demand is good. Quality remains good, with lighter color which is a characteristic of the summer crop.

Oranges: Demand is increasing on small choice fruit as schools begin. Supplies of these small sizes will continue to tighten. Quality remains good.

CUCUMBERS

Western Cucumber: Baja's production is lighter and will remain so through the month. Quality is dropping. Fresno will begin by the end of August. Washington's new fields have started, but supplies are slow in to come.

Eastern Cucumbers:

Supplies are plentiful, quality is good, demand is low and the long stretch of bottom level

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markets is forcing shippers to try to push the market up. This push will continue through the week.

GRAPES

Supplies of red Flame seedless grapes are starting to wind down and the Crimson variety is starting to ramp up. Supplies will still remain decent for Flame red seedless grapes this week, but will finish quickly over the next 7-10 days. Green seedless varieties (Princess and Thompson) continue to produce very good supplies and quality is excellent! There are also beautiful Black Seedless and Red Globe Seeded grapes available. They are all available from the Fresno, Delano, Arvin and Bakersfield districts with excellent quality. Temperatures continue mild in the major growing areas, and it has been optimal for color and sugar levels. Demand remains strong for both red and green seedless, but supplies are strong as well. The markets should remain steady through this week.

GREEN ONIONS

This market continues to gain strength. Mexico is in a gap of production. This is expected to last for at least two weeks minimum. Pencil sizes are still the largest volume available but still the production numbers are light. The quality continues to be good with no significant problems to report.

KIWI

Chilean Kiwi quality remains good, with the exception of a few soft lots arriving from Chile but movement is still very good. New Zealand Kiwi is also available and they are in good quality and supply. The market will remain steady again this week.

LEAF LETTUCE

Supplies are light on romaine. Expect this commodity to be light in supplies throughout the week. Romaine hearts will also be on the light side, especially forty-eight counts. There continues to be reports of browning inside the internal parts of the leaf. There is good availability on all other leaf items. The Salinas Valley and Santa Maria growing regions have experienced weather conditions that have made the growing process more difficult.

LETTUCE

This market has remained stable. Many suppliers have moderate amounts of product available to ship. Supplies look to be moderate throughout the week. There was a rumor the market was going to gain strength towards the end of last week, but the demand just did not exceed supplies. Light weight issues are less compared to the previous week. There has been some tip burn that has been seen at harvesting time.

MELONS

Cantaloupes: Fair weather prevails in the Central Valley and fruit is sizing up to mainly large. Fruit is peaking more on the 9ct sizes this week and there are deals available. The supplies of small fruit are not as heavy this week and that will continue into next week as well. There continues to also be regional melons available, increasing the overall supplies and further softening demand. Fruit quality remains excellent with high sugar levels. **Honeydews:** Honeydew supplies are steady again this week and demand is only moderate. The larger sizes are still more readily available and there are deals available. Quality continues excellent in honeydews with creamy white color, good solidity and high sugar levels. Expect the market to trend to remain steady this week.

ONIONS

Huron is still going strong with good supplies. They will have good availability through the end of the month. Washington has limited supplies and the skins have not totally set there is some product out there with greening. Idaho/Oregon will start packing both red and yellow this week into next but they are also seeing some greening. New Mexico is all but finished for the season.

POTATOES

New crop Norkotahs are just starting in Idaho there will be several more new sheds starting to pack this week so it will be a slow go. Burbanks are finishing up this week with several shipping transitioning to only Norkotahs. Norkotahs have a much larger size profile than the old crop Burbanks so there will be much better availability on the larger cartons. With the new crop however product is

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very nice looking and the 2's will be limited. ALL NEW CROP WILL BE NORKOTAHS. Washington new crop Norkotahs are going strong with good quality and good availability. Colorado has limited supplies of old crop and quality is still good. California colored potatoes still available with very good quality. There are supplies available out of Stockton and limited Bakersfield availability. Southern Washington is going with good availability on reds and yellows. Mount Vernon, Washington should start up in the next couple of weeks.

SQUASH

Western Squash: Baja continues with fair supplies. Salinas and Santa Maria are starting to move into new fields, with light supplies. Production looks to increase through the week and into next.

Eastern Squash: Squash supplies are steady out of the upper mid west. This week's slightly higher market will continue its upward trend through the week as the northeastern growing regions wind down.

STONE FRUIT

Mild temperatures remain in the major fruit growing areas of the Central Valley and production numbers remain light on Nectarines and Red/Black Plums. Demand is still very strong and the market is up on both Nectarines and Plums again this week. Nectarines are very tight, and will continue to be tight over the few weeks. Peaches are where the deals are and there are plentiful supplies available. Washington is also going now on Peaches and Nectarines with increasing production over the next 7-10 days. Cherry production is finished for the season out of Washington.

TOMATOES

Western: San Diego continues crossing decent volume now but demand is eating up most open fruit. Reports of Baja quality have been good.. The round market is active, as we are currently seeing a drop in the smaller sizes (bloom drop) due to recent excessive heat. With the lack of smaller sized tomatoes we can expect some reaction to the pricing. Roma tomatoes are becoming active due to the lack of supply in the east.

Eastern: The past rain in the east has disrupted production, and we have seen

reduced pickings. We are expecting more rain to affect the east by mid week. Roma tomato supplies seem to be affected the most and rounds have good supply of larger sizes lacking LG and MED.

WATERMELONS

Watermelons look to remain steady in supply again this week. There are regional areas throughout the US producing Watermelons, but there continues only to be just enough to satisfy the demand pressure. Bakersfield remains the peak production area for both seeded and seedless watermelons, but will see a drop in production over the next two to three weeks. Markets remain strong and demand strength continues as well. Quality is very good for both seeded and seedless.

VALUE ADDED

Issues continue to be seen with some processors on romaine and lettuce. Fringe burn is the biggest issue. Some light bruising has also been reported on chopped romaine. Broccoli processors are steady with supplies and availability. Complaints have been minimal on green onions. Shippers continue to stress keeping the cold chain in tact with all processed items. Any temperature abuse will cause a serious drop in shelf life.