

VEGETABLE	SOURCE	September 3, 2010
<u>Asparagus</u>	Peru, Mexico	Higher prices reached their “bounce back” point and began dropping very quickly. That is not so much because of supplies, but rather due to the very lackluster national demand. In Peru, high temperatures are only reaching into the mid-60 degree range. Some growers are only harvesting once or twice a week from many fields in the Valley of Ica. Imports are about a third of normal. As a result, we are seeing sizing issues. All sizes are near the minimal ranges. If you look at the Large, sizes, they look more like Standard size, especially near the tip. Standard sizes look more like Pencil sizing. The good news is that as we move through September, we will see increasing supplies from Mexico and Peru. This will be Spring in Peru, which is why they are such great suppliers through the Fall and into the holiday season.
Broccoli	Santa Maria, Salinas, Mexico, Northeast, Canada	Last week’s heat wave pushed several fields into early production, leaving us with some slightly lighter harvest numbers this week. In normal markets, this would really pressure prices higher, but this year, with lackluster national demand and with very little Labor Day or Back-to-School demand from retailers, there has been little pressure on prices to move too high. There are also supplies from the Northeast, primarily Maine and Canada. This is helping to handle most East Coast business.
Cabbage	CA, TX, NY, MI, WI, CO, WA	We are seeing much tighter supplies of Napa and Bok Choy. Prices have really been pressured higher. Red and Green round Cabbage is fairly normal in supply and quality for this time of year. It seems that as each week goes by, we see another state or two end their summer production.
Carrots	CA, Mexico, TX, MI, Northwest	Supplies from all growing regions are fairly normal for this time of year. We are seeing good production from Oregon and Washington as well.
Cauliflower	Santa Maria, Salinas, Northeast, Canada	Same as Broccoli
Celery	Santa Maria, Salinas, MI	Quality from Santa Maria is just OK. The best quality is coming from the Salinas Valley. This is peak of supply for that growing region. We are also seeing peak supplies from Michigan, which should stay in production through September and into early October, or until the first frost hits the region.
Corn	CA, NY, MI, Local	Labor Day weekend is usually the final hurrah for summer Sweet Corn. We quickly end many of the local and even regional growing districts by early September. The heat wave in California will cause some Corn to have incomplete tips. Corn likes to have more even temperature plateaus. When temperatures jump from the 80s to triple digit, and then back to the 80s, several temperature plateaus are skipped, leading to the immaturity of the Corn tips.
Cucumbers	Baja, MI, OH, CA, NY, WA	There are plenty of local and regional farmers in production from the Northeast to the Northwest. We only have about 3 – 4 weeks of decent production from local and regional sources. Early rains or cold will bring summer production to an abrupt halt.
Eggplant	CA, MI, Local	There are many regional and local areas in production from California to Virginia, New Jersey to Washington. We are seeing fairly normal supplies and quality for this time of year.
Green Beans	CA, TX, NY, Local	We are seeing fairly normal supplies and quality for this time of year from East and West coast growers.
Herbs	CA, TX, FL	Most fresh herbs are holding up well under the roller-coaster weather patterns in California. Arugula is certainly one herb that does not like changes like this. We have seen more supply and quality issues with Baby and regular Arugula. This mid-summer Basil has had excellent oil and flavor.
Lettuce – Iceberg	Salinas, Santa Maria, Local	We’re already looking at young fields in Huron, which should start their harvest by early-October. Salinas fields seemed to handle the mini-heat wave fairly well and fields seem to be coming out of it with decent yields and quality. We are seeing some slight quality issues, mainly fringe and internal burn, some dehydration and lighter carton weights. This will also affect shelf life. This time of year, as we have already mentioned, growers generally fight strong insect populations. Currently, we are seeing very little insect damage, but it can escalate as we move through September.
Lettuce – Leaf	Santa Maria, Salinas, Local	Red Leaf and Butter seem to be holding their supplies and markets. Green Leaf, however, is seeing some volatility. We are noticing a lot more processor demand, pressuring prices higher. Demand is not only for salad production but also for whole leaf fillet production. This is really eating up a lot of acreage, and keeping the pressure on Green Leaf prices.
Lettuce – Romaine	Santa Maria, Salinas, Local	Same as Iceberg

Lettuce – Spring Mix	FL, Salinas	We are seeing a full range of lettuce and green colors. All greens and lettuces seem to be holding up well, with good shelf life.
Mushrooms	CA, TX, PA	Most above-ground growers tend to fight higher temperatures this time of year. These above-ground beds do not have cooling systems to cool the beds and mushrooms. This time of year, you tend to see more “cracks” in the top. This is caused by dehydration.
<u>Onions</u>	NM, CO, CA, Northwest	The Northwest is now the main sourcing for Onions. As several hundred growers in the region are digging and curing, that provides plenty of supply, which has helped bring markets to some of their lowest points this summer. We are still concerned about the impact of a Chinese shortfall. Already, Taiwan, one of several Pacific Rim countries, is showing interest in Northwest Onions. The Chinese floods will certainly have an impact, but it’s not clear how much of an impact. Most of the impact could be felt late-Winter and into Spring of 2011.
<u>Onions – Green</u>	Mexico, CA, SC	Inclimate weather in Mexico has affected supplies. In fact, some growers saw hail in their fields, which just shreds up the green tops. In walking the fields, we are expecting to see the affects well into late-September.
Peas	Off-Shore, CA	Central American supplies are coming from Peru and Guatemala. Supplies are still a little lighter than normal, and that is keeping prices higher for this time of year. Domestically, we are seeing more production from California coastal areas, but not enough to handle the shortfall from Central America.
Peppers – Chiles	Baja, CA, Local	We are seeing normal supplies and quality for this time of year. Although some of the hot Chile Pepper varieties have been a little milder in their heat. Usually, the hotter the summer temperatures, the hotter the Chile Pepper. With such a mild summer in California, Chile Peppers have had milder flavors, even the Jalapeno and Serrano Peppers.
Peppers – Green	CA, OH, NJ, MI, Local	Good growing conditions have finally put us into the peak of summer supplies. We are seeing small seed pods, thick walls, good color and block shape. Summer yields are at their best from both East and West sources, although we are watching for quality issues in the East. Rains and then heat can easily cause stem rot, and we have noticed some slight suntan in some lots.
Peppers – Red & Gold	CA, Northwest, Canada, Europe	This is supposed to be the peak of the season for colored Bell supplies. That is certainly holding true for Red Bells. Gold Bells have almost been nonexistent...and very expensive. Hot house Gold supplies from Canada are an alternative, but a pricey one.
<u>Potatoes – Russet</u>	ID, CA, WA, CO, WI, Various	There are still some storage Burbank russets in the supply chain. They may be cheaper, but they are showing more signs of cracking and bruising. Prices are higher for new crop Norkotah russets. Remember that new crop russets will be freshly dug and packed, which can mean more moisture in the cartons. If you find this, be sure to air them out to prevent decay. During this last month of growth, the spud gains over 50% of their size and weight, so a lot can still happen to the spuds in the ground in the Northwest.
<u>Potatoes – Red, White & Yukon</u>	CA, FL, MN, WI, Local	Prices are much higher. Supplies of new Potatoes in the West have been fairly normal, but in the East, the heat wave has taken a toll on supplies and has taken some of the color out of the Reds. We are even seeing Red, White and Yukon supplies from more northern growing areas like Wisconsin, Minnesota and Washington.
<u>Potatoes – Yams</u>	CA, NC, MS, LA	We are watching Hurricane Earl very carefully as it brushes up against the Carolinas. We’re talking with growers there because this is Sweet Potato harvest time. Flooded fields can easily cause the Sweet Potatoes to become suffocated. Without oxygen to the roots, the tuber will simply decay in the field before it can be dug up. Storage Sweet Potatoes are virtually gone, which leaves us with only new crop Sweet Potatoes. They are “green,” not cured, which means their flavor will be milder, not as sweet, and they won’t hold as long.
Spinach	Oxnard, Salinas, Local	We are seeing adequate supplies of regular and Baby Spinach. Quality has been getting a little suspect as we see more mildew in the fields caused by earlier dampness in the region.
Squash – Yellow/Zucchini	OH, MI, CA, Local	We are seeing very good supplies from the East and the West, and even from Canada. This is a great vegetable value right now. In the East, as we start to see colder night temperatures, that’s when Eastern supplies will really start to take a plunge and markets will get a bit more volatile.
<u>Tomatoes</u>	Baja, OH, NJ, TN, AR, CA, Local	There are still many local growers limiting their sales to only local distribution. Even so, there are so many local and regional growers in production right now, that is really taking the pressure off of prices. Over the next 3 - 4 weeks, we will see the last of the full summer supply from regional growers. Main sourcing continues to be

FRUIT	SOURCE	
		California and Ohio. California stays in production into November, but for the Midwest and East, as colder, longer nights set, that's when plants really begin to lose production. We are already looking at fields in Georgia and northern Florida, getting ready for their first Fall harvest.
Apples	WA, NY, MI, CA, Local	The storage season from Washington is coming to close with only Reds and Granny Smith left in storage. Many orchards in most regional and local growing areas are now in harvest of their early varieties. Remember that the first of the season apples will generally be smaller in size. Last year's official varietal counts put the top three apples as Red, Gala and Fuji, in that order.
<u>Avocado</u>	Mexico, CA, Chile	We have really noticed that California growers have slowed down their harvest activity. California fruit continues to be the main source, and has fantastic quality, but growers are trying to extend their remaining meager supplies into October. Last year, by this time of year, California was virtually finished for the season. This year, we are expecting California Hass supplies right into mid-to-late-October. We are seeing air shipped containers coming in from Chile. Their season will have a slow start, but by mid-September, we should see the first ships hitting North America. An earlier freeze is leaving Chilean growers with a 30% smaller crop. Mexico is barely shipping any fruit north of the border as they make their way through the weakest part of their season. They are expecting a smaller crop as well. With both Chile and Mexico expecting smaller crops, we should see higher market plateaus this Fall and Winter.
Bananas	Ecuador, Central America	We are seeing better quality fruit right now, ripening up very nicely. We are seeing more pressure on prices because of increased demand from schools now being in session.
Berries – Blackberries	CA, Northwest	Harvesters are discarding a lot of fruit in the fields. Recent heat has hurt not only supplies but berry quality and shelf life. Berries are very tender and delicate. Prices are much higher than normal for this time of year.
Berries – <u>Blueberries</u>	Northwest, MI, BC	Prices are really reflecting the much tighter supplies from the Northwest and Canada. Expect these higher prices right through September. By October, we should start to see some of the first imports from the Southern Hemisphere, primarily Argentina and Chile. We are expecting a slow start to their season, but we are expecting average supplies by the holidays.
Berries – Raspberries	Salinas, Oxnard, Northwest	Harvesters are discarding a lot of fruit in the fields. Recent heat has hurt not only supplies but berry quality and shelf life. Berries are very tender and delicate. Prices are much higher than normal for this time of year.
Berries – <u>Strawberries</u>	Watsonville, Salinas, Oxnard	This time of year can drive harvesters quite crazy. In walking fields, we are still seeing a lot of red in the furrows. To keep their harvest numbers up, harvesters are picking not only very mature fruit, but also less mature fruit. This ends up with a lot more "checker board" appearances. Over mature fruit tends to cause more "leakers" in the cartons. Also, because the mature fruit has higher sugar content, and is softer, that can promote a quicker instance of decay. Order your fruit on the conservative side, be sure of proper rotation and storage temperatures and use it quickly. Better weather in Watsonville should mean stronger berries. Late-Summer fruit always tends to be smaller in size, averaging 20 – 25 berries per 1# container. Oxnard is picking up steam in harvest production. By early-September, Oxnard should rival Watsonville for sales, and the fruit will be stronger and ship better.
Citrus - <u>Grapefruit</u>	CA, South Africa	The main source continues to be California. Remember that California fruit generally doesn't have the juice or color that we expect to find from Florida or Texas.
Citrus – Lemons	CA, Mexico, Chile	Storage fruit from Oxnard and the San Joaquin Valley is seeing tighter supplies of smaller size fruit. New crop Lemons from District III (California/Arizona desert) is just starting, with better supplies by mid-September. Import fruit from Chile and Mexico are helping to pick up the slack, helping to keep prices from being pressured even higher. If you can stand some of the appearance issues of Mexican fruit, we are seeing some good values there.
Citrus – Limes	Mexico	We are seeing that importers are sorting through their imports a bit more often. What they are pulling out is stem breakdown caused by earlier rains in Mexico. New crops have begun, but that means smaller size fruit will be predominant, and the best value. Large size Limes are seeing much higher prices.
Citrus – Oranges	CA, Chile, South Africa	It's normal that the late season fruit always tends to be larger in size. That makes smaller size fruit (113s and smaller) much more difficult to find, and higher in price. California Valencias are cutting excellent, with no signs of dry cell. There are also import Navels from the Southern Hemisphere, but they are expensive.

Grapes	CA	We are into the very peak of summer production from California's San Joaquin Valley. There are plenty of Black, Green and Red Seedless Grapes, with a good range of berry sizes. Sugar and flavor has been excellent. Cluster sizes have been wonderful, a sign of excellent growing conditions. We should see strong supplies through September and October, with continuing but declining supplies into December. By Thanksgiving, we might see the first Southern Hemisphere Grapes from Brazil and Argentina, followed by Chile and then by South Africa.
Kiwifruit	Chile, New Zealand	Southern Hemisphere fruit remains the main source into October. That's when California vineyards will once again be in harvest. Chilean fruit will be the first to leave the scene, followed by New Zealand.
Mangoes	Mexico	Mexico is in the final few shipments of their record season. When the final shipments come in, we're expecting almost 48 million cartons. Within the next few weeks, we are expecting the first imports from Brazil, followed by fruit from Ecuador by early-October.
Melon – Cantaloupe	CA, Various, Local	Retail demand has been surprisingly weak, especially as we head into the Labor Day weekend. Ad promotions were minimal, and that translates into strong supplies available for foodservice. Larger size fruit had been the best value, but that is changing to more medium sizes, 12s – 18s. We should see peak San Joaquin Valley supplies from now into October, or until the first major rainstorms hit. Fruit is cutting with excellent color, but with cooler temperatures this week, we have noticed that netting color has become more gray in appearance, not tan.
Melons – Honeydew	CA, Local	Same as Cantaloupe
Melons – Watermelon	CA, Local, Various	Labor Day retail demand has been fairly lackluster nationwide. After Labor Day, national production will dwindle, leaving California as one of the main sources. Over the next 3 – 4 weeks, domestic production will just about be cut in half from current levels. Retailers will begin reducing their shelf and floor space, which will further reduce demand.
Pears	CA, WA	The Bartlett Pear harvest is finished from the Sacramento River district, although supplies are still available. Harvest is now in full swing in Lake County, as well as in Washington. Bartletts from the Sacramento River area will ripen faster than fresh picked pears from Lake County or Washington. Other specialty Pears are also being harvested, including the Red, Bosc, Forelle and Seckel. Asian Pears are also in full harvest in the San Joaquin Valley.
Pineapple	Hawaii, Costa Rica, Ecuador, Mexico	Supplies have been at the weakest point for the year, typical for the summer months. Usually, by September, we start seeing stronger supplies from Costa Rica, Ecuador, Hawaii and Mexico. This is the time of year when quality issues can have an impact.
Stonefruit	CA, WA, Various, Local	There are only a few weeks left of good Peach and Nectarine supplies. We are seeing the first European Plums, which always signals the beginning of the end to summer Plum supplies. Still plenty of white and yellow flesh fruit, although this time of year, smaller size fruit supplies get very tight. Fruit is ripening up well, cutting well, and has good flavor. We will start moving into late-season varieties, which always mean more pale or light color to the skin.