

{{ time_now|date:"January 2, 2006" }}

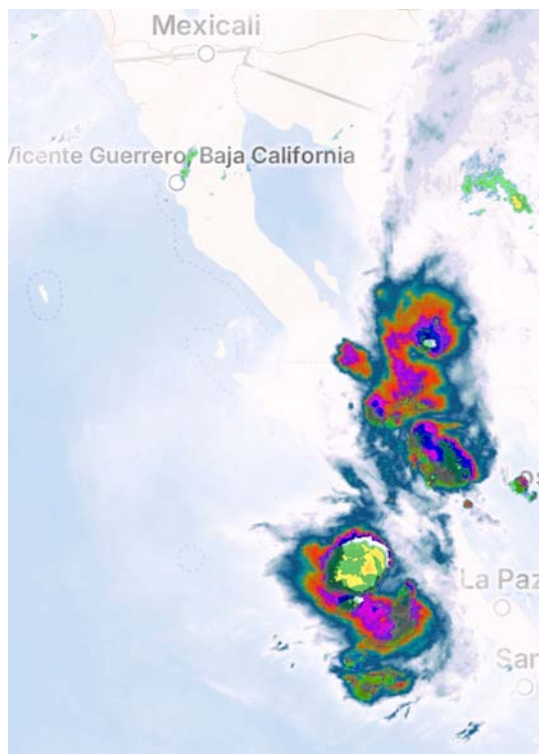


MARKET REPORT

WEATHER UPDATE

Outlook

A system of wet weather activities for the next few months is just getting started. Interruptions in the Baja growing area are a growing possibility. The Culiacan, Sinaloa Mexican winter tomato crop is being interrupted by major thunderstorms. This could raise havoc with the typical harvest start dates in December - January. Extreme caution regarding tomato promotions given the current and developing weather situation.



TOMATOES

Tennessee: this area continues to be challenged by the cumulative 35+ inches of rain the area has received. Crop yields are way off (40-50%) and quality is fair at best. Market in the mid to high \$20s. Roma tomatoes are also in the mid \$20s.

California: demand for dry, good quality tomatoes from California has been off the charts due to the weather back East. Markets are in the high teens to low \$20s.

Mexico: big vine-ripe tomatoes are mid to high \$20s. Very few available. Roma tomatoes are mid \$20s with few available.

Heirloom Tomatoes

- **Organic Heirlooms:** Harvest out of Mexico is on a crop transition gap until approximately week of September 28th. Weather continues to delay new crops. California crops are showing signs of recent heat conditions. Weather has taken a toll on quality. Crop transition gap against both regions.

- **Heirlooms:** Harvest against “California grown” is in abrupt crop transition due to extreme heat. Mexico remains on crop transition gap until approximately week of September 28th.



TOV's: fair to good supplies out of Mexico. Canada and the USA supplies are mixed. FOB pricing is mostly in the \$10.95 - \$12.95 range. Light to fair demand.

Organic TOVs: fair to good supplies out of Mexico. FOB cost is mostly \$12.95 - \$14.95. Occasional higher quotes. Demand has been steady.

Beefsteak: Fair to good supplies out of Mexico and Canada. FOB quotes ranging from \$12.00 - \$16.00, mostly in the \$13.00 - \$14.00 range. Fair demand.

Organic Beefsteak: good supplies out of Mexico. FOB market is ranging anywhere from \$12.95 to \$16.95. Demand has been light.

Organic Roma: good supplies out of Mexico. Baja is still 10-14 days away. FOB cost is \$19.95 to \$22.95. Light demand.

Snacking tomato

- grape tomatoes have become very short both on the organic and the conventional side
- organic medley tomatoes are short but good supply on conventional

Purple Crush: will start in one week. Reach out to your sales rep for more info.

CUCUMBERS

Persian: cucumbers are still very short and costs are up. Organics are especially short. September is typically a tight month and volume will improve in early to mid-November.

English: volume is light and costs are rising on both conventional and organic english cucumbers. The organic euro cuks are very short.

Organic Slicer: steady volume out of Mexico. Still waiting on California to start soon. Price is steady.

Slicer: cucumbers out of Baja have become more plentiful. Increased availability has helped bring the market back to normal levels. Jalisco is also starting up on Super Selects, with product beginning to cross through Nogales.

SQUASH

Organic Hard Squash: good volume and quality on all organic squash out of Central California. More volume now on the organic honeynut squash.

Organic Soft Squash: California has steady supply on zucchini and yellow squash. Pricing is high.

Italian Squash: Italian squash has become extremely limited across all sizes in both Santa Maria and Fresno. Weather has impacted field production, with the season starting off hot, followed by rain and now cooler temperatures. Rain is anticipated again, which could further affect availability. The market is expected to remain elevated for the next couple of weeks.

Yellow Squash: good quality yellow squash remains extremely limited out of Santa Maria and Fresno, keeping the market elevated. Supplies expected to remain tight for the next couple of weeks.

FRUIT

Organic Apples: new crop domestic Gala's and honeycrisp have started out of the Northwest. Organic Fuji's and Granny Smith apples starting in about a week.

Organic Melons: great quality and supply on all California grown melons. Shipping from Brentwood and Lodi, CA.

Mango: Mangos are done out of Mexico Brazilian mangos have started out on the East Coast.

Organic Mango: The Mexican Organic mango season has finished. We have Organic California Keitt mangos currently out of the desert with very large sizes 6-9 ct. Prices are higher, but the eating quality is excellent!

Pineapple: Mexican pineapple supplies are pretty much done. Costa Rica pineapples are short and quality is varying.

Strawberries

Salinas/Watsonville

- these regions continue to move closer to the end of their season. Growers are hoping to continue through the last week of September; weather permitting. Quality remains variable depending on the remaining varieties.

Santa Maria

- is now the primary growing region and will remain so until Central Mexico, Baja and Oxnard begin to ramp up production over the next several weeks.

Central Mexico/Baja

- production has begun at very light levels in these regions, with full production not expected until the end of September.

Oxnard

- production is just beginning to emerge in this region. Volumes are expected to gradually increase week over week as we move into October.

Blueberries: Central Mexico and Peruvian imports will dominate the fresh market over the next several months. Product is currently shipping through California, New Jersey, Florida and Texas.

Blackberries: supplies remain extremely limited and are expected to stay that way until mid-October, when Mexican production begins to increase. The current supply gap is the result of adverse weather conditions in the transitioning Central Mexico growing regions.

Shippers continue to struggle to meet contractual commitments, resulting in reduced fill rates and order cuts across the industry.

Raspberries: supplies are adequate but remain on the light side. Mexican production is expected to increase steadily week over week as we move into October.

VEGGIES

Cilantro: active prices with cilantro

Green & Black Kale: green kale is steady

Onion Leeks: steady at the elevated levels - more onions around the past couple of days

Italian & Curly Parsley: higher here on both with curly especially being short

Broccoli Crowns: higher with some limited harvests and inventories yesterday to start the week

Jicama: Good supply.

Brussels: been higher across the board due to some increased insect pressure mostly. Mostly prices are starting to hit trigger levels for contracts.

Organic Brussels: Mexicali – limited volume. Guaymas brussels sprouts ranch is burning out early this year. Continued high heat and lack of winter has caused increased quality issues with aphids and whitefly. Grower had transition back to Mexicali for next week and then transition to new fields in Rayon.

Onions: Yellow onions remain high priced. Higher freight rates is keeping the prices up. White onions are still very tight and will remain short for a few more weeks until more volume comes on up North. Red onion pricing is moving up slightly this week. Sweet onions are available.

Green & Red Cabbage: higher on conventional green cabbage. Red is slightly higher as well.

Corn: higher and limited on all three out of California. Some better supplies out East.

Eggplant: California production has become more plentiful, improving overall availability. Market has come down and pricing has softened.

POTATOES

Russet: potatoes are still very high. The 5 lb and 10 lb russet bags are steady. Historic water shortages in goring areas is going to tighten things up for 26/27.

Red & Gold: CA and Texas Reds, yellow potatoes have come down as new crop Idaho/WA starts up. Very limited white potatoes are very high priced if available. Red size C's are still short.

White: extremely short - especially A's and C's.

Chipping: new crop has started out of Idaho. Quality is good

CITRUS

Lemon: mixture of domestic and Chilean available. Peaking on 140's and smaller fancy. 95/115 limited. Chilean fruit having issues.

Organic Lemon: we have good supplies of Mexican fruit for bags. D3 has started but very tight on fancy 95/115s. FOB in the low \$60s.

Grapefruit: better volume for about the next 10 days. Then going another block with less volume.

Organic Grapefruit: industry is gapping for about 2 weeks until desert starts.

Navels: we have good volume on Chilean fancy 56's and smaller loading on the West Coast.

Limes: pricing seems to be softening for this week and prices should remain soft for next week. Next week costs will depend on quality, demand and availability. We are seeing significant amount of quality issues. We are also seeing more lighter color limes with thinner skin which makes it difficult to ship with increase risk of quality issues upon arrival. Some growing regions have started harvesting new crop limes. However, the production on volume remains low. Limes remain in transition period between the old and new crops remain uncertain. New crop 230s/200s quality and shelf life is better and the old crop 175s/150s/110s quality and shelf life remain a concern. 150s through 250s are available. 110s remain limited. Weather will continue to be the variable that will influence supply & pricing throughout the summer.

Valencia: very heavy to choice grade (about 30% fancy). Fancy fruit getting tighter. Harvest starts to wrap up at the end of September.

Organic Valencia: Organic fruit we will have good supplies through September. Smaller fruit tight and mid sizes are firming up.



BELL PEPPERS

Organic Green: Steady volume for the next month out of California. Steady pricing.

Organic HH Color: Steady volume out of Mexico and Canada. Price is steady.



Bell Peppers: California has good volume on green, red and yellow bells. Green price is going up.

HH Bells: good volume out of Mexico and Canada. Price is steady from both regions.



Organic Mini Sweet Peppers: currently available out of Baja, Mexico and Oxnard, California

CHILI PEPPERS

Jalapeño - Good Supply
Serrano - Good Supply

Current growing regions:

- Chihuahua, Mexico
- Baja, Mexico
- Coachella, USA

Stable supply on all chili peppers. Demand is moderate.

Anaheim - Good Supply

Caribe - Good Supply

Red Fresno - Good Supply

Habanero - Good Supply

Pasilla - Good Supply

Thai Chili - Good Supply

Shishito - Good Supply

Tomatillo - Good Supply



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