



SYSCO Produce Planner

September 25, 2009

Please Distribute to:
 Executive Chef
 General Manager
 Kitchen Manager
 Purchasing Manager
 F&B Manager

TO THE POINT...

A SYSCO PRODUCE quick glance at the top produce items, their quality, pricing and market conditions.

Quality Price

	H I G H	A V G O	P O O R	H I G H	A V G O	L O W
Asparagus	✓					✓
Beans		✓				✓
Broccoli	✓					✓
Cabbage	✓					✓
Cauliflower	✓					✓
Celery	✓					✓
Cucumbers		✓		✓		
Lettuce – Iceberg		✓				✓
– Leaf		✓				✓
– Romaine		✓				✓
–Spring Mix		✓				✓
Onions – Red	✓					✓
Onions – Yellow	✓					✓
Peppers – Green	✓					✓
Peppers – Red	✓					✓
Potatoes – Russet	✓					✓
Squash – Yellow		✓		✓		
Squash – Zucchini		✓				✓
Tomato – Cherry		✓				✓
– Grape		✓				✓
– Mature Green		✓				✓
– Roma		✓		✓		
– Vine-Ripe		✓				✓
Avocado – Calif.	✓					✓
– Imports		✓				✓
Berries		✓				✓
Grapes	✓					✓
Kiwifruit	✓					✓
Lemons		✓		✓		
Limes		✓		✓		
Melon – Cantaloupe	✓					✓
Melon – Honeydew	✓					✓
Melon – Watermelon	✓					✓
Oranges		✓		✓		
Pineapple	✓					✓
Strawberries		✓				✓

TOP FIVE

5 ITEMS TO TALK ABOUT TODAY

CANTALOUPE... Seed varieties used for harvest this time of year tend to have more a greener cast to the background color behind the netting.

CUCUMBERS... Marginal quality and shorter shelf life will describe these Cucumbers from more northern growing areas from Washington to Michigan to the Northeast.

GRAPEFRUIT ... We are seeing the first harvest from both Texas and Florida.

STORMS ... Some regions in Georgia received up to 20” of rain last weekend, followed by more rains this week.

TOMATOES... There are only a few more weeks left in most of the regional and local Tomato deals around the country, particularly in the East and Midwest.

SOUTHEAST STORMS

Some regions in Georgia received up to 20” of rain last weekend, followed by more rains this week. We were concerned by row crops like Bell Peppers, Cucumbers, Green Beans, Eggplant, Squash and Tomatoes. In talking with Ag officials in Georgia, it seems that rains did not have the expected impact on new crops. In fact, most new crops are on schedule with their harvest. We will keep you up to date with any changes in supplies caused by weather conditions.

AVOCADOS

California’s season is over, with new crop Avocados expected mostly in January. By mid-December, most California growers are in the orchards doing “selective picks” of fruit that has fully matured. In walking orchards now, the upcoming crop looks to come in at around 500 million pounds, a huge increase over the last year. Mexico’s new crop was just starting up when rain disrupted harvest. That will certainly stall Mexican imports at a time when supplies are needed the most. Remember that the first Mexican fruit will have minimal oil content, which will mean longer ripening times. This can cause fruit in the same carton to ripen in uneven patterns. Minimal oil also means the fruit is more susceptible to chill damage, so limit refrigeration on this new fruit. Chilean fruit has helped take some pressure off of pricing. During transition from domestic to import supplies, we tend to find more issues with quality and pricing. Imports are quickly establishing their hold on market supplies. We are already seeing markets settle down and will continue to do over the next month.

BERRIES – STRAWBERRIES

We have started to see some early harvest from the Oxnard and Santa Maria growing areas in southern California. Growers in Watsonville are still recovering from some rains a week ago. Rain on red Strawberries can cause the berry to melt, so growers sent pickers into the fields to strip any berry that had some red on it. It takes a week or so for these fields to get back up to speed. Not only did growers have to deal with some rains, but now are dealing with late season hot temperatures. Harvesters are walking the fields clearing plants of over mature and over ripe fruit. Watsonville growers are harvesting less than half of what they harvested just 6 – 8 weeks ago. We are certainly on the decline, but will continue with decent supplies until the first major rains begin in the West. Usually, by late-September-to-early-October, Oxnard and Santa Maria becomes a major source once again. This time of year, shelf life is a major concern. We encourage you to order conservatively and make sure of proper rotation. The speed of distribution from the



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field to your business makes a huge difference in your waste and also in eating quality. Even an extra day added to the distribution chain will mean softer berries and a shorter shelf life for customers.

CITRUS – GRAPEFRUIT

We are seeing the first harvest from both Texas and Florida. Over the next few weeks, we should see improving supplies from both growing regions. Texas did see some rains this year, which certainly helps with sizing. For the first time in a few years, Florida fruit will be allowed to be exported to all states this season. By mid-to-late-October, there should be plenty of Texas and Florida Grapefruit.

CUCUMBERS

Most northern growing regions are finding normal quality for their end of the season crops. Marginal quality and shorter shelf life will describe these Cucumbers from more northern growing areas from Washington to Michigan to the Northeast. Over the next few weeks, their supplies should end completely. That will leave sourcing in fewer hands, and that will pressure prices higher. As we begin transitioning to more southern growing areas in Georgia and Mexico, we can find more volatile markets.

GRAPES

Growers in the San Joaquin Valley usually harvest fresh-cut Grapes into October. That's when we start seeing Grapes come in from storage. When we see carton sizes change from 19# to 16#, that's when we know we are mainly in "cold storage" fruit, not fresh-cut fruit. We are seeing the typical range of berry sizes, reflected in the typical range of pricing. Flavor and sugar content have been excellent on Black, Green and Red Seedless Grapes. Some of the Red Seedless taste like candy on a vine.

LETTUCE - ICEBERG

So far, supplies from Salinas are still keeping up with demand, although we are noticing some quality issues, especially with puffy heads and light color. By next week, we are expecting a noticeable supply decrease, which could pressure prices higher. On top of this, many of the local and regional Lettuce supplies are ending their

season, leaving more pressure on supplies from Salinas to handle national demand. This time of year, we tend to see more insect and plant disease damage to the Lettuce crops. This can account for as much as 25% fewer yields during harvest. Until heavy rains come and early frost, insect populations in the Salinas Valley are growing rapidly. These tiny insects can spread plant disease very quickly, which reduces yield, quality and shelf life. We have walked the early fields in the Huron growing region. Acreage was down in the Spring, and in looking at the region, we are seeing a bit more "brown dirt" than usual. That simply means fewer acres planted for the Fall. The first cuts in Huron should be by the second weekend of October.

MELONS - CANTALOUPE

Heat has returned to the San Joaquin Valley, and that will mean some very good tasting fruit. You will notice some physical changes in current Cantaloupe supplies. Seed varieties used for harvest this time of year tend to have more a greener cast to the background color behind the netting. We are also seeing less straw color to the fruit. Even so, the fruit being harvested right now has very good flavor and sugar content. The West Side growing region in California's San Joaquin Valley should stay in production into mid-October. By then, we should be moving to the California and Arizona desert for a short season, before moving into imports from Mexico and the Caribbean for winter supplies starting in December.

MELONS - WATERMELON

From older fields, this time of year, late in the season, you tend to see more mealy flesh in Watermelons. This is when we start looking to fresh fields like Arizona. Before long, we will be pulling supplies from northern Mexico, in Hermosillo, Sonora. This former desert has sprung to life with irrigation water over the past few decade, and has become one of the premier growing regions for Fall Watermelon. Over the next 4 – 6 weeks, we will expect to see more roller coaster quality and more pressure on pricing.

POTATOES – YAMS

Harvest is in full swing in all major growing regions, including North Carolina, Louisiana, Mississippi and California. In fact, most growers in North Carolina say they are more than 50% finished with their harvest and should be completed by mid-October. We were concerned with the very heavy rain storms that hit the southeast recently. In talking with growers, the rains have had not impact on Sweet Potatoes. Heavy rains can cause considerable damage to Sweet Potatoes. The rains can flood fields, which cuts off the oxygen supply to the roots. With a few days, without oxygen, the Sweet Potatoes simply rot before they can be dug up.

TOMATOES

There are only a few more weeks left in most of the regional and local Tomato deals around the country, particularly in the East and Midwest. Bad weather in Michigan will most likely be ending their season much sooner than normal. Ohio, Tennessee, Arkansas and the Carolinas will most likely have moderate supplies into early-October. Once the first frost hits, those fields will be done of the year. We're already talking to Florida growers in Quincy. They are expecting some crown picks this weekend. We should follow with fields further south in Ruskin and Palmetto. Growers there say fields look healthy with start dates by late-October. In the West, the San Joaquin Valley should stay strong with supplies until the first frost. Usually, by Halloween, crops will be finished. That pushes us to imports from Baja and Mexico. We are concerned about some of the early fields, which should be providing product in November. Some of the first fields in Torreon, Mexico, which is just across the border from El Paso, Texas, is have trouble with yields. The strong national market in Mexico may keep prices high right on into November. This may impact Roma Tomatoes more than other types and varieties. We could see some volatility in the Grape Tomato market as many regional areas end early, and before Fall acreage can start up in Georgia or Florida.