



WEEKLY NEWSLETTER AND COMMODITY REPORT

SEPTEMBER 1, 2009

RESTAURANT SPOTLIGHT

L'ÉCOLE CULINAIRE Memphis, TN



L'Ecole Culinaire's new location in Memphis, TN brings a new face of culinary education to the MidSouth area. A sister branch of the St. Louis location, the curriculum is designed to provide all students with an exceptionally strong and well rounded background in all aspects of the hospitality and food and beverage industry. Students spend 100% of their time on the study of their chosen field, with a unique curricular structure based on a ten-week educational phase rather than on traditional college semesters or quarters. Students take only one major course during each phase, which allows them to concentrate their learning efforts and get the most from their education.

With strong support from local chefs, restaurant owners and foodservice industry leaders, L'Ecole offers a versatile and well-rounded experience for aspiring chefs and culinary artists. After graduating from L'Ecole, students will have a strong background in baking and pastry, and will develop a thorough knowledge and honed skills in all other aspects of the hospitality industry, food and beverage management. L'Ecole currently offers an Associate of Occupational Studies Degree in Culinary Arts and a Diploma in Culinary Essentials.

For more information, please visit
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MARKET REPORT

APPLES/PEARS

California Gala Apples are going strong now with good supplies and Washington new crop Galas are increasing in supply. California Granny Smith apples are going in a light way and gearing up for better supplies this week. Red Delicious supplies continue tight in Washington, and will remain so until new crop starts (may be as early as next week) but as many areas are going right now on red typed apples, demand has eased. Gold apples are now packing light supplies in the Ginger Gold and Early Gold varieties. Bartlett Pears are going with better supplies in Washington this week. Anjou pears are finished for the season, but Bartlett Pears from WA and CA will fill any gaps on green pears. California Bartlett Pears remain in excellent supply and will continue to be heavy with volume on the smaller sizes. Also shipping from California are the Bosc, Golden Russet Bosc, European Bosc, Seckel Asian and Stark Crimson Pears with good supplies.

ASPARAGUS

The market for Mexican product currently is stable. Pricing continues to be stronger on Mexican product compared to Peruvian product loading out of Miami direct. Mexican grass will continue to be light supplies on all sizes. Peruvian grass has had a gap in production due to weather. The transition to the Southern region is producing smaller quantities of product. This will continue for another two weeks.

AVOCADO

We are into imported fruit from Chile and Mexico. California's season is winding down with very little left. Chilean and Mexican supplies continue improving.

- **Mexican Fruit:** New crop crossings will continue to improve, with supplies of 60's and smaller in good volume and 48's look to improve over the next couple of weeks. Please note that early new crop oil content will be low and require additional time for ripening.
- **California Fruit:** A few California growers continue to pack very light numbers, and many growers have finished with this years crop. There should be limited amounts available into next week.
- **Chilean Fruit:** Supplies of Chilean fruit are good; smaller sizes still are the peak volumes and larger sizes are improving. Fruit has early season characteristics, but will steadily improve in eating quality as we get further into the season.

BELL PEPPERS

Eastern Bells:

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

BERRIES

- **Strawberries:** Product is very limited as we come off a very hot weekend. We are still experiencing moderate bruising and very red berries at shipping point. The days are now getting shorter, the plants are "past peak" and we can expect quality to be fair with production moderate compared to prior months. We are getting close to the southern growing areas to come on line again, as we get more detailed information in regards to a start date, we will let you know.
- **Raspberries:** Raspberry production remains steady. Most to all shippers have good supplies. There are no major happenings with production or upswings with pricing. Local production quality has been good.
- **Blackberries:** We are continuing to see irregular local California production in the Salinas and Watsonville areas, but are expecting a bit of a decline, Mexico and Guatemala are not sending enough fruit up to ease the demand. . All growing areas have slowed and shippers are cutting back orders...
- **Blueberries:** Oregon and Washington are done harvesting a bit early due to excessive heat, so production in the Northwest has been disrupted. British Columbia continues to produce at a lower than normal rate due to some recent rain slowing things down. There is 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. We can expect to see higher fobs.



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BROCCOLI

Supplies are stable as is the market for this commodity. This market is expected to get stronger towards the end of the week with any kind of demand. For now, supplies exceed demand. Sharper pricing out of the Santa Maria region continues. 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. Expect cauliflower to get more active towards the end of the week as supplies are reported to be lighter with many suppliers. The quality continues to get better in terms of quality and texture. Santa Maria and Salinas continue to be the main areas of production. Pricing is competitive in both areas.

CELERY

The availability continues to be strong with most suppliers on all sizes. The 24 counts continue to have the largest volume. Large volume orders can still demand a sharp price. Michigan supplies continue to keep the California market stable. 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 to tighten. 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. Large sizes (110's and 150's) still limited. Demand is good. Quality remains good, with lighter color which is a characteristic of the summer crop.
- **Oranges:** Demand is continues very strong, and demand is exceeding supplies on 113's and 138's and expect it to stay this way until navels start in November. Supplies are peaking on fancy 72/88's.

CUCUMBERS

Eastern Cucumbers: Rain related quality / supply issues and weeks of a bottom level cucumber market will push prices back up. Anticipate a gradual increase through the week and marginal quality.

GRAPES

California grapes are going strong with the Crimson, Ruby and Un-named Red seedless varieties this week. Green seedless varieties (few Princess and mainly Thompson) continue to produce very good supplies and quality is excellent. There are also beautiful Black Seedless and Red Globe Seeded grapes available. Temperatures were hot over the weekend, but have already cooled back down. Cooler nights this week will keep quality in good shape. Demand remains strong for both red and green seedless, but supplies are strong as well. The markets should remain steady again this week and don't forget our September Grape Promotion, "Crunch Time"!

GREEN ONIONS

This market is stable. Mexican product continues to get stronger in production numbers. Supplies are expected to be strong in September. Pencil sizes are still the largest volume available. The quality continues to be good with no significant problems to report.

KIWI

New Zealand Kiwi is still going strong and they are in good quality and supply. Chilean Kiwi remains available but in light supply as we start September. The market will remain steady again this week.



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LEAF LETTUCE

Suppliers are light to start the week on Romaine. Expect supplies to be short throughout the week on this commodity. Romaine hearts will continue to be on the light side, especially forty-eight counts. Expect small numbers in production throughout the week. There is good availability on all other leaf items. The Salinas Valley had extremely warm temperatures this past weekend and this will inevitably cause some defects such as internal burn to surface in the next week.

LETTUCE

This market continues to be stable to start the week. Some suppliers are heavier in production than others, and this has caused a variance in price anywhere from two to three dollars. Supplies look to be moderate throughout the week. Product availability will tighten up with a big push but for now the market is stable. Some puffiness will be seen to lettuce this week due to high temperatures in all the growing regions that was seen this past weekend. Expect some tip burn issues to surface.

MELONS

- **Cantaloupes:** Hot weather over the weekend brought on light supplies of the smaller fruit, but temperatures are already cooler for the balance of the week in the Central Valley. Fruit will continue to pack out heavier to the big fruit (12's and LARGER) but there will be a decent manifest of sizes this week. There continues to be regional melons available, but only in light supply and not in demand like the Westside deal. As predicted the market is stronger this week, and could get stronger as we move into the weekend with some demand strength. Fruit quality remains very good with high sugar levels.
- **Honeydews:** Honeydew supplies look to remain steady this week and demand is only moderate. The larger sizes (5ct and JBO 5ct) are still more readily available and there are deals available. Quality continues to be very good in honeydews.

ONIONS

Idaho/Oregon with very good availability this week on red, yellow and whites. Greening is still a factor probably for the next couple of weeks. Quality is good but the skins have not completely set to the nice dark Idaho product we are used to. They will continue to get better over the next few weeks. Huron is done for the season. Washington supplies are getting better but with export coming in and loading heavily they are a little more limited. There are supplies available out of Colorado and Utah as well.

POTATOES

New crop Norkotahs are going strong with very good quality. Burbanks are all but done for the season. Norkotahs have a much larger size profile than the old crop Burbanks so there will be much better availability on the larger cartons and the small sizes will hold steady prices. However, with the new crop so nice 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 started with new crop as well. California colored potatoes still available with very good quality. There are supplies available out of Stockton. Southern Washington is going with good availability on reds and yellows. Mount Vernon, Washington has started with limited availability.

SQUASH

Eastern Squash: The quality on squash, particularly the yellow squash, is marginal at best now. Crops are getting old and tired and with so many small growers as the source during the summer, that means limited supplies. This market will continue to climb into the weekend and quality will remain fair to poor. South Georgia has begun in a very light way this week.

STONE FRUIT

Both Red and Black Plums are very tight with only light production again this week. Demand is still very strong and the market is up again this week. Nectarines have eased off a bit with better availability this week and new fall varieties available. Peaches have lightened up to start September and will be tighter through the week. Washington is still only producing light volume on Peaches and Nectarines with increasing production over the next 7-10 days.



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TOMATOES

Eastern: Demand remains steady and is keeping the market fairly stable despite the shortages we have encountered across the country. Weather has improved in the east allowing the fields to dry out. TN, NC, and VA are back harvesting crown fruit, so smaller sizes will be snug for another week or so.

WATERMELONS

Regional as well as California Watermelons are still available, but overall supplies remaining only moderate. California volume will drop off over the next 2 weeks. Bakersfield remains the peak production area for both seeded and seedless watermelon. Markets remain strong and demand strength continues as well. Quality is very good for all watermelons.

VALUE ADDED

Expect there to be issues on lettuce and leaf items with most processors. The high heats in all the growing regions will likely make these commodities weaker. 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, and production numbers should increase this week.