

The Source

Commodity of the Month - Carrots



MARKET ALERTS

Asparagus - Production declines as Peru begins light production, expected to ramp up in April.

Avocado - Triggers impact 60ct and 70ct sizes; markets steady, Mexican fruit scarce, California fruit lighter.

Lemons - Peak sizing 115ct and larger, District 1 main region; smaller sizes extremely tight below 140ct.

Oranges - Fruit peaks at 72ct and larger, scarce at 88/113/138ct due to low sets and rain

Garlic - Supplies tight; Argentinian harvest signals market volatility.

Red/Green Grapes - Imported grapes expected tight until Chilean deal ends in early May.

Green Onions - tighter markets due to mildew issues and lower yields, expected to remain strong into next week.

Iceberg Lettuce - Salinas and Santa Maria growers grapple with Anthracnose quality issues, impacting yield and value-added items; extent of damage unknown,

Cantaloupe - Retail promotions stabilize, demand steady, loading schedules shift due to vessel delays.

Honeydew - Offshore fruit tight due to lower yields, growers anticipate improvements by Mother's Day.

APRIL 17, 2024

CROP UPDATES

Growers are transitioning from Southwestern Desert regions to coastal valleys in California due to cold storms, potentially disrupting lettuce plant development and quality, and potentially causing physiological changes. [Read more](#)

WEATHER

Arizona - High-pressure ridging aloft is expected to cause warmer temperatures through the weekend, with morning lows in the 50s and low 60s, afternoon highs in the mid-upper 90s, and gusty winds from the south.

California - A strong high pressure system is causing temperatures to gradually warm, with lows ranging from mid-30s to low-40s south of King City, and low 60s to 70s near the coast. Temperatures will cool on Friday.

Florida - Warm and dry through Saturday, with isolated showers in northern Florida by Sunday. Winds between 18-24 mph in southeast Florida and Tampa Bay area through Friday.

Mexico - Central Mexico is expected to experience warm temperatures and few light showers over the next five days, with maximum temperatures in the upper 80s to mid 90s and mild mornings.

FREIGHT

This week's freight state focuses on transitioning from Yuma to Salinas, with expected shipper delays. Warmer weather outlook may alleviate delays, but fuel and rates remain steady.



IN PEAK



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Commodity Updates



Apples

In April and into May, you can expect good supplies of most apple varieties. Gala and Gold Delicious are notable exceptions. Golds have started their seasonal volume decline as shippers reach the end of their storage deal. There is still a lot of storage tonnage to go for Galas, and they are a very popular variety with consistent demand. We should have galas until the new crop but they will remain tight.

Commodity/Region	Supply	Price	Quality
Hudson, New York (September - June)	Steady	\$\$\$	Good



Asparagus



Due to seasonality, asparagus production from Mexico continues to decline. Peru has started with light production. As we move through April, Peru's volume should increase.

Commodity/Region	Supply	Price	Quality
Caborca (Year Round)	Steady	\$\$\$	Good
Ciudad Obregon (Year Round)	Steady	\$\$\$	Good
Peru (Year Round)	Steady	\$\$\$	Good



Avocados



For 60ct and 70ct sizes, triggers are in effect. Markets are steady at higher levels, but poised to rise again when the Cinco De Mayo pull comes into effect. Peru is just around the corner, with fruit expected to arrive in volume late-May/early-June. Sizing is expected to peak at 60/70ct; which is not normal for Peruvian fruit coming into the US. Due to the high dry matter content of Mexican fruit, ripening times remain short. California fruit is coming online in a light way with ripening time being longer due to lower dry matter.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
California (April - July)	Light	\$\$\$	Good



Bell Peppers

Supply is fairly steady and demand is moderate. FL is transitioning to Plant City, so the newer fields have better quality and size. In Nogales, there's still old crop Sinaloa product coming across so sizing and quality is still a challenge. Sonora's new crop fruit has good sizing and thick walls. The market is expected to hold steady over the next week as Coachella season begins on Monday. The colored bell pepper market remains depressed. Canada is now in full production contributing to overall supply availability.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Steady	\$\$\$	Good
Mexico (November - May)	Light	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Berries (Blackberries)

Over the next few weeks, Central Mexico and California should have better availability on this item. There is some Georgia product becoming available. Most all quantities are being transferred for consolidation purposes

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Good
McAllen, Texas (October-May)	Light	\$\$\$	Good
Georgia (April - July)	Light	\$\$\$	Good



Berries (Blueberries)

A few light numbers are coming out of California locally, as well as some offshore and CMEX transfer product. Local Georgia and Florida crops are ramping up. Peak production should begin next week. Most all quantities are being transferred for consolidation purposes

Commodity/Region	Supply	Price	Quality
California (Year Round)	Steady	\$\$\$	Good
Dover, Florida (Year Round)	Steady	\$\$\$	Good
McAllen, Texas (October-May)	Light	\$\$\$	Good



Berries (Raspberries)

Over the next few weeks, Central Mexico and California should have better availability on this item. Most all quantities are being transferred for consolidation purposes.

Commodity/Region	Supply	Price	Quality
California (Year Round)	Light	\$\$\$	Fair
Dover, Florida (Year Round)	Steady	\$\$\$	Good
McAllen, Texas (October - May)	Steady	\$\$\$	Good



Berries (Strawberries)

In Santa Maria, Oxnard, Salinas, Watsonville and any of the growing areas, we do not expect any rain over the next few weeks. In all areas, we expect volume to pick up next week.

Commodity/Region	Supply	Price	Quality
California (Year Round)	High	\$\$\$	Fair
Dover, Florida (Year Round)	Steady	\$\$\$	Fair

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Driscoll's
Only the Finest Berries™



Commodity Updates



Broccoli

Salinas and Santa Maria continue to have good broccoli supplies and quality this week. Going into the weekend, expect the market to remain steady.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Fair
Santa Maria, California (Year Round)	Steady	\$\$\$	Fair



Brussel Sprouts

The supply of Brussels sprouts continues to be good this week. Look for promotable volume through late April.

Commodity/Region	Supply	Price	Quality
Mexico (December-August)	High	\$\$\$	Good
Oxnard, CA (May - July)	High	\$\$\$	Good



Carrots

The whole carrot market is steady. The Imperial Valley is now the main region for growth. Size is looking good. No issues for the foreseeable future.

Commodity/Region	Supply	Price	Quality
Imperial Valley (February - May)	Steady	\$\$\$	Excellent



Cauliflower

Cauliflower supplies and quality remain consistent in Salinas and Santa Maria this week. Look for this market to remain steady as we approach the weekend.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Santa Maria, California (Year Round)	Steady	\$\$\$	Good
Salinas, California (May - October)	Steady	\$\$\$	Fair



Celery

As we transition out of Yuma, this market remains steady. The majority of loading will take place in the Santa Maria/Oxnard area. Most shippers continue to provide above average quality. If orders are loaded in Salinas, a transfer fee will be added. This will continue through April.

Commodity/Region	Supply	Price	Quality
Oxnard, California (Year Round)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

Key Partners



Commodity Updates



Citrus (Lemons)

ALERT

115ct and larger is the overall peak sizing. The main growing region is District 1. Sizes smaller than 140ct are extremely tight.

Commodity/Region	Supply	Price	Quality
Oxnard/Ventura (October - February)	Light	\$\$\$	Good
San Joaquin Valley (October - May)	Light	\$\$\$	Good



Citrus (Limes)

The market is losing momentum. Currently, FOBs out of Texas are in the low \$30s, while smaller fruit is in the \$20s. The availability of offshore fruit has kept the market from escalating. Overall, the quality is good. As May approaches, expect the market to continue to soften.

Commodity/Region	Supply	Price	Quality
Veracruz (Year Round)	steady	\$\$\$	Good



Citrus (Oranges)

ALERT

Fruit is currently peaking on 72ct and larger; 88/113/138ct are extremely scarce and will remain so throughout the navel season. Fruit will continue to size up as the season progresses due to low fruit sets and rain events. As we navigate this shorter Navel season, please be flexible with size and grade. Lead time is very important; please send orders 5-7 days in advance. Brix are in the 12-14 range; quality is good. At this time, there is no gassing.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (Year Round)	Light	\$\$\$	Good



Cucumber

There is a steady supply on both coasts. For the summer/fall season, Nogales will operate through May, and Baja will operate through June. For the next few weeks, east coast availability will be good due to multiple regions with production. The quality is good.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	Steady	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good



Eggplant

Markets are steady on both coasts. We will start seeing production in Plant City FL and the CA desert in about 2-3 weeks.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	steady	\$\$\$	Good
Mexico (November - May)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Garlic

ALERT

In general, garlic supplies domestically remain tight. Recent months have seen a good harvest of Argentinian garlic in South America. However, this will not fill the overall supply gap. It is expected that the garlic market will become more volatile and tight over the next few months.

Commodity/Region	Supply	Price	Quality
East Coast (Year Round)	Light	\$\$\$	Good
Bakersfield, California (Year Round)	Light	\$\$\$	Good
Gilroy, California (Year Round)	Light	\$\$\$	Good



Grapes (Green)

ALERT

Imported grapes remain very tight through the end of the Chilean deal in early May. Mexico is expected to start in mid-May, according to shippers. Despite cautious optimism, there will not be a gap like last year.

Commodity/Region	Supply	Price	Quality
Chile (January - April)	Light	\$\$\$	Good



Grapes (Red)

ALERT

Imported grapes remain very tight through the end of the Chilean deal in early May. Mexico is expected to start in mid-May, according to shippers. Despite cautious optimism, there will not be a gap like last year.

Commodity/Region	Supply	Price	Quality
Chile (January - April)	Light	\$\$\$	Good



Green Onions

ALERT

Green onions this week continue to be on the tighter side. As a result of previous weather, most shippers are experiencing mildew issues and lower yields. It is expected that this market will remain strong into next week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Good



Kale

Heading into the weekend, kale supplies and quality are good.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Yuma, Arizona (November- May)	Steady	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Lettuce Iceberg

ALERT

The main growing regions for this commodity are Salinas and Santa Maria. Multiple shippers have had problems harvesting quality product due to rains and cool weather in the Salinas valley. Anthracnose has arisen, causing quality issues. Currently, it is unclear the extent of the damage, but multiple shippers are experiencing yield problems. During the next few weeks, we will be able to determine the extent of damage this pathogen will cause to Salinas Valley products. Santa Maria is not having these issues but less product is grown in this region. At the end of the week, value-added items will be escalated.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Fair
Santa Maria, California (March-December)	Light	\$\$\$	Fair
Salinas, California (May - October)	Light	\$\$\$	Fair



Lettuce Leaf

Yuma has finished production. There will be moderate supply in Huron, Salinas, and Santa Maria throughout the week. There is a lack of demand on the market, and this is reflected in the price. There are multiple suppliers offering soft romaine, green and red leaf, and hearts of romaine. Multiple suppliers have provided quality that is above average. It is expected that Romaine will come off of an escalation on value-added products later this week.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Good
Huron, Arizona (Seasonal)	Steady	\$\$\$	Good
Salinas, California (May - October)	Steady	\$\$\$	Good



Lettuce Tender Leaf

With arugula and spinach, most suppliers are playing catch-up. Because of the rain last weekend in Salinas, tender leaf items tend not to stand tall for harvest. The warmer weather this week should help move things along. There will be some yellowing that will limit production, resulting in lower yields.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Steady	\$\$\$	Fair
Oxnard, California (Year Round)	Steady	\$\$\$	Fair



Melon (Cantaloupe)

ALERT

Retail promotions are stabilizing and demand remains steady. Loading schedules are shifting towards the end of the week due to vessel delays (primarily on the West). The availability of Mexican cantaloupes is expected to ease the situation at the end of the month. A brix level of 12-15% is present, and the quality of the fruit remains solid with minimal scarring.

Commodity/Region	Supply	Price	Quality
Central America (December - May)	Light	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Melon (Honeydew)

ALERT

Due to lower yields from offshore growing regions, offshore honeydews are expected to remain tight for a few weeks. By Mother's Day, growers hope to see improvements. Currently, Mexican honeydews are starting to enter the market, bringing relief.

Commodity/Region	Supply	Price	Quality
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Arizona (June-July) (October-November)	Light	\$\$\$	Good
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Central America (December - May)	Light	\$\$\$	Good
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Melon (Watermelon)

With additional suppliers available from Nogales, the watermelon market has started to normalize. Florida only offers a limited amount of watermelons, and they have restrictions on where they can be shipped. Florida's production was delayed by weather delays and lower yields.

Commodity/Region	Supply	Price	Quality
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Arizona (June-July) (October-November)	Light	\$\$\$	Fair
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Central America (December-May)	Light	\$\$\$	Fair
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Mushroom

Supply and availability are excellent.

Commodity/Region	Supply	Price	Quality
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Nationwide	Steady	\$\$\$	Good
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Onions

California Desert will begin shipping new crop onions. Supplies of Texas and Mexican onions are increasing. The price remains high, but it is trending downward.

Commodity/Region	Supply	Price	Quality
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South Texas (July-April)	Steady	\$\$\$	Good
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Tri-Cities, Washington (July-April)	Light	\$\$\$	Fair
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California Desert (April - May)	High	\$\$\$	Excellent
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Pears

The majority of shippers are nearing completion of their Bosc pack outs by the end of the month. Anjou's market is firm and slowly rising. Since there are no other varieties to pack and storage supplies are dwindling, this market will slowly advance and remain tight. California Bartletts are in bloom now, and the new crop will start in mid-July.

Commodity/Region	Supply	Price	Quality
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Hood River, Oregon (August-July)	Light	\$\$\$	Good
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Yakima, Washington (August-July)	Light	\$\$\$	Good
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Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Commodity Updates



Pineapples

Spot market availability is limited, so suppliers are focusing on their contracts. Weather in the tropics has caused fruit to mature faster than normal causing lower yields. This is expected to last throughout mothers day. 6ct crowned and 7ct crownless pineapples have been impacted. Pineapples of special varieties are in high demand.

Commodity/Region	Supply	Price	Quality
Costa Rica (Year round)	Steady	\$\$\$	Good



Potatoes

Burbanks are receiving a premium over Norkotahs. The CT of 40 - 70 potatoes is higher than that of 80 - 120 potatoes.

Commodity/Region	Supply	Price	Quality
Bancroft, Wisconsin (August-July)	Steady	\$\$\$	Excellent
Idaho Falls, Idaho (August-July)	High	\$\$\$	Excellent
Monte Vista, Colorado (August-July)	Steady	\$\$\$	Excellent
Pasco, Washington (August-July)	High	\$\$\$	Excellent



Squash

The availability of yellow and zucchini is lower this week as newer regions start and older crops wind down. The quality is good. Georgia will begin towards the end of the month. In Nogales, most of the volume now is coming from Sonora. The quality has held up well.

Commodity/Region	Supply	Price	Quality
Florida (November - May)	High	\$\$\$	Good
Mexico (November-May)	High	\$\$\$	Good



Stone Fruit

We are only a few weeks away from domestic tree fruit. Cherries and apricots will be available around the last week of April. Then come peaches in the first half of May, nectarines in mid-May, and plums in late May. In June, a greater variety and volume will be available.

Commodity/Region	Supply	Price	Quality
San Joaquin Valley (May-October)	Light	\$\$\$	Fair



Tomatoes

Demand exceeds on rounds and romas. Prices are steady at elevated levels. The price of bigger fruit is higher. Mexico's quality is hit or miss. There is a plentiful supply of snacking tomatoes. It is expected that supply will remain at these levels until newer areas get going. Baja and CA are scheduled to begin in May, while eastern MX will not start until the end of April.

Commodity/Region	Supply	Price	Quality
Mexico (Year Round)	Light	\$\$\$	Good
Florida (November-May)	Light	\$\$\$	Good

Price Key: \$\$\$ -Low, \$\$\$ -Steady, \$\$\$ -High

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Weather Updates



CALIFORNIA

A strong high pressure system remains over the area, causing temperatures to slowly warm. South of King City, lows will range from mid-30s to low-40s, while elsewhere, lows will range from low 40s to low 50s. There will be low 60s to low 70s near the coast and mid 70s to mid 80s elsewhere during the day. There is a weakening of the high on Friday, causing temperatures to cool across the region. The minimum temperatures will be in the upper 30s to low 40s by Saturday.



MEXICO

Over the next five days, Central Mexico will see warm temperatures and only a few light showers. Over most fields, maximum temperatures will be in the upper 80s to mid 90s through Sunday. Most spots will have mild mornings through Sunday, with temperatures in the upper 50s to mid 60s. Shower chances will remain low and isolated, with rain totals generally less than 0.10" where showers do occur.



FLORIDA

Through Saturday, it will be warm and dry. It is possible that some isolated showers will develop over northern Florida by Sunday as a cold front moves southward. Through Friday, winds will gust between 18 and 24 mph over most of southeast Florida and the Tampa Bay area.



ARIZONA

Warmer than normal temperatures are expected through the weekend due to persistent high-pressure ridging aloft. The morning lows will be in the 50s and low 60s Wednesday, warming to the low-60s and mid-60s by Sunday morning, while afternoon highs will be in the mid-upper 90s every day. On Sunday, the temperature could reach near 100 in the Imperial Valley. The wind is from the south, light overall, but gusty at 15-20mph most days.

For more information: <https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h>

Freight Updates



State of freight this week focuses on wrapping up transition from Yuma to Salinas. This will be the last week shipping from Yuma. Shipper delays in Salinas continue to be a challenge and delays should be expected. Long term weather outlook is warmer and will bring reprieve to shipper delays. Fuel is steady, rates are steady.



U.S. On-Highway Diesel Fuel Prices*(dollars per gallon)

[full history](#) [XLS](#)

	04/01/24	04/08/24	04/15/24	Change from	
				week ago	year ago
U.S.	3.996	4.061	4.015	▼ -0.046	▼ -0.101
East Coast (PADD1)	4.083	4.118	4.068	▼ -0.050	▼ -0.130
New England (PADD1A)	4.305	4.305	4.311	▲ 0.006	▼ -0.229
Central Atlantic (PADD1B)	4.271	4.272	4.241	▼ -0.031	▼ -0.245
Lower Atlantic (PADD1C)	3.990	4.042	3.979	▼ -0.063	▼ -0.077
Midwest (PADD2)	3.949	4.011	3.965	▼ -0.046	▼ -0.062
Gulf Coast (PADD3)	3.670	3.760	3.710	▼ -0.050	▼ -0.166
Rocky Mountain (PADD4)	3.949	4.008	3.956	▼ -0.052	▼ -0.148
West Coast (PADD5)	4.651	4.723	4.702	▼ -0.021	▲ 0.010
West Coast less California	4.147	4.257	4.218	▼ -0.039	▼ -0.238
California	5.221	5.259	5.256	▼ -0.003	▲ 0.293

*prices include all taxes

For more information: <https://www.eia.gov/petroleum/gasdiesel/>

Crop Update



Growers will complete the transition from the Southwestern Desert regions to the coastal valleys (Oxnard, Santa Maria, Salinas) of California this week. These regions were impacted by another cold storm system with substantial precipitation between ½”- 2” over the weekend. Forecasts indicate that this system looks to be the last winter type storm system of the season. These temperature variations can lead to physiological changes in lettuce plants and disrupt the developmental process impacting quality and shelf life.

These fields, planted in January, have seen substantial rainfall and generally cool temperatures throughout their growth cycle. The cool, moist conditions provide ample opportunity for mold, mildew and disease pressure to thrive and enter the fields. We are seeing reports of “Anthracnose” impacting some leafy green acreage especially romaine and iceberg lettuce in the Salinas Valley. Anthracnose is a soilborne pathogen favored by cool, wet periods and can survive for long periods in the soil. The pathogen spreads when rain or sprinkler droplets splash spores from infected plants onto surrounding fields carried by the winds. Cool temperatures are required for high spore production and the disease is primarily a problem in the early spring. Shippers are seeing this disease across the valley in current and upcoming acreage impacting production, especially in the Romaine stands.

Early production continues to show smaller head sizes and density contributing to lighter carton weights. Romain and Romaine heart stands are showing darker outer leaves with little heart material currently. These leaves are prone to bruising and mechanical damage especially when processed. Processed items will likely continue to see an increase in bruising, discoloration and breakdown showing up in the bag affecting quality and shelf life. Cool temperatures have also hindered growth rates in the cauliflower fields leading to light supplies in the near term.

On a positive note, long-range forecasts bring a warming trend with dry conditions to California into late April. This will help combat anthracnose, mildews and pathogens in the fields and improve growth rates and overall quality of crops as growers ramp up production.



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