

The Source

Commodity of the Month - Dry Onions



MARKET ALERTS

Asparagus - Limited supply and quality is fair.

Brussel Sprouts - Limited supply and quality is fair.

Lemons - Limited supply and quality is fair.

Iceberg Lettuce - Limited supply and quality is fair.

Onions - Steady supply and quality is average.

Potatoes - Limited supply and the quality is fair.

JULY 26, 2023

CROP UPDATES

The weather in California has been hotter than usual, leading to faster crop growth but also affecting the texture and shelf life of processed items. In the Northeastern U.S., storms have impacted crops, increasing the demand for crops from California. Adverse weather conditions in Mexico have also led to lighter supplies, further pressuring California production. [Read more](#)

WEATHER

Arizona - High temperatures over the next five days will fluctuate a few degrees (Wed 110-116 degrees, Fri 108-114 degrees) with afternoon highs above seasonal averages. Morning lows Monday, mid 70s to mid 80s, cooling a few degrees Thu/Fri, low 70s to low 80s.

California - Mon-Tue will be a little warmer as the high strengthens, with morning lows in the low 50s to low 60s, daytime highs near the coast in the mid-60s to low 70s, mid-80s to low 90s in coastal valleys, and upper 90s to 105 inland.

Florida - Temperatures have cooled several degrees and are expected to remain near-to-above normal through Friday, with highs in the low to mid 90s daily, but likely cooler in the north counties Monday due to increased rain. This week, morning lows will be in the low-upper 70s.

Mexico - Through the weekend, maximum temperatures are expected to be mostly in the mid 70s to mid 80s across the region.

FREIGHT

Truck supply and fuel remain steady this week.



DON'T FORGET TO REGISTER



PRO*ACT
2023 SUMMIT

October 9-11, 2023
Monterey Marriott

AT PEAK SEASON



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Commodities at a Glance



Commodity/Region	Supply	Price	Quality
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Apples

Sparta, Michigan (September-July)	Steady	\$\$\$	Good
Yakima, Washington (August-July)	Steady	\$\$\$	Good

Commodity/Region	Supply	Price	Quality
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Berries (Blackberries)

California (Year Round)	Light	\$\$\$	Good
Georgia (April-July)	Light	\$\$\$	Fair



Asparagus

ALERT

Caborca (Year Round)	Light	\$\$\$	Fair
Ciudad Obregon (Year Round)	Light	\$\$\$	Poor
Peru (Year Round)	Light	\$\$\$	Fair



Berries (Blueberries)

California (Year Round)	High	\$\$\$	Excellent
Dover, Florida (Year Round)	High	\$\$\$	Good



Avocados

California (April - July)	Light	\$\$\$	Good
Mexico (Year Round)	Light	\$\$\$	Good



Berries (Raspberries)

California (Year Round)	Light	\$\$\$	Fair
Dover, Florida (Year Round)	Light	\$\$\$	Fair



Bell Peppers

California (May-October)	Steady	\$\$\$	Good
Ohio/NC/MI (July-September)	Steady	\$\$\$	Fair



Berries (Strawberries)

California (Year Round)	Steady	\$\$\$	Fair
Dover, Florida (Year Round)	Steady	\$\$\$	Fair

Commodities at a Glance



Commodity/Region	Supply	Price	Quality
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Broccoli

Mexico (Year Round)	Light	\$\$\$	Poor
Salinas, California (May-October)	Steady	\$\$\$	Fair
Santa Maria, California (Year Round)	Steady	\$\$\$	Fair

Commodity/Region	Supply	Price	Quality
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Celery

Oxnard, California (Year Round)	Light	\$\$\$	Fair
Salinas, California (May-August)	Light	\$\$\$	Fair



Brussel Sprouts

ALERT

Mexico (December-August)	Light	\$\$\$	Fair
Oxnard, California (May-July)	Light	\$\$\$	Fair
Salinas, California (July-December)	Light	\$\$\$	Fair



Citrus (Lemons)

ALERT

Oxnard/ Ventura County (February-September)	Light	\$\$\$	Fair
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Carrots

Various Northwest Regions (July-October)	Steady	\$\$\$	Good
Kern County, California (May-July) (October-February)	Steady	\$\$\$	Good



Citrus (Limes)

Veracruz (Year Round)	Steady	\$\$\$	Fair
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Cauliflower

Mexico (Year Round)	Steady	\$\$\$	Fair
Salinas, California (May-October)	Steady	\$\$\$	Fair
Santa Maria, California (Year Round)	Steady	\$\$\$	Fair



Citrus (Oranges)

California Desert/Yuma (April-November)	Steady	\$\$\$	Good
San Joaquin Valley (Year Round)	Steady	\$\$\$	Good

Commodities at a Glance



Commodity/Region	Supply	Price	Quality
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Cucumbers

Baja California (May-October)	Steady	\$\$\$	Good
Ohio/NC/MI (June-September)	Light	\$\$\$	Fair

Commodity/Region	Supply	Price	Quality
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Grapes (Red)

San Joaquin Valley (June-December)	Steady	\$\$\$	Good
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Eggplant

California (May-October)	Steady	\$\$\$	Good
Ohio/NC/MI/NJ (June-September)	Light	\$\$\$	Fair



Green Onions

Canada (June-September)	Steady	\$\$\$	Good
Mexico (Year Round)	Steady	\$\$\$	Good



Garlic

East Coast (Year Round)	Steady	\$\$\$	Good
Bakersfield, California (Year Round)	Steady	\$\$\$	Good
Gilroy, California (Year Round)	Steady	\$\$\$	Good



Kale

Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Salinas, California (May-October)	Steady	\$\$\$	Good



Grapes (Green)

San Joaquin Valley (June-November)	Steady	\$\$\$	Good
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Lettuce Iceberg

ALERT!

Mexico (Year Round)	Light	\$\$\$	Fair
Oxnard, California (March-June)	Steady	\$\$\$	Fair
Salinas, California (May-October)	Light	\$\$\$	Fair
Santa Maria, California (March-December)	Light	\$\$\$	Fair

Commodities at a Glance



Commodity/Region	Supply	Price	Quality
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Lettuce Leaf

Mexico (Year Round)	Steady	\$\$\$	Good
Oxnard, California (Year Round)	Steady	\$\$\$	Good
Salinas, California (May-October)	Steady	\$\$\$	Good



Lettuce Tender Leaf

Mexico (Year Round)	Steady	\$\$\$	Fair
Oxnard, California (Year Round)	Steady	\$\$\$	Fair
Salinas, California (May-October)	Steady	\$\$\$	Fair



Melon (Cantaloupe)

Arizona (June-July) (October-November)	Steady	\$\$\$	Good
San Joaquin Valley (July-October)	Steady	\$\$\$	Excellent



Melon (Honeydew)

Arizona (June-July) (October-November)	Steady	\$\$\$	Excellent
San Joaquin Valley (July-October)	Steady	\$\$\$	Excellent

Commodity/Region	Supply	Price	Quality
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Melon (Watermelon)

Arizona (June-July) (October-November)	Steady	\$\$\$	Excellent
San Joaquin Valley (July-October)	Steady	\$\$\$	Excellent



Mushroom

Nationwide	High	\$\$\$	Excellent
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Onions

ALERT

San Joaquin Valley (May-August)	Steady	\$\$\$	Good
Hatch, NM (July-April)	Steady	\$\$\$	Excellent
South Texas (July-April)	Light	\$\$\$	Good
Tri-Cities, Washington (July-April)	Light	\$\$\$	Fair



Pears

Sacramento Valley (July-September)	Steady	\$\$\$	Good
Hood River, Oregon (August-July)	Steady	\$\$\$	Good
Yakima, Washington (August-July)	Steady	\$\$\$	Good

Commodities at a Glance



Commodity/Region	Supply	Price	Quality
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Pineapples

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

Baja California (Spring/Summer-November)	Light	\$\$\$	Good
California (July-October)	Steady	\$\$\$	Good
Mexico (Year Round)	Steady	\$\$\$	Good



Potatoes

ALERT

Bancroft, Wisconsin (August-July)	Light	\$\$\$	Fair
Idaho Falls, Idaho (August-July)	Light	\$\$\$	Fair
Monte Vista, Colorado (August-July)	Light	\$\$\$	Fair
Pasco, Washington (August-July)	Light	\$\$\$	Good



Squash

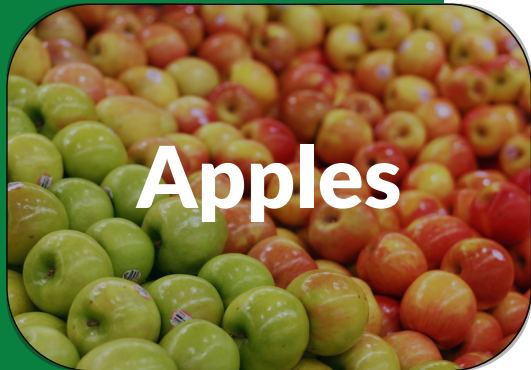
California (May-October)	Steady	\$\$\$	Good
Ohio/MI/OH/NJ (June-September)	Steady	\$\$\$	Fair



Stone Fruit

San Joaquin Valley (May-October)	Steady	\$\$\$	Good
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Commodity Updates



Apples

Foodservice-size galas, pinks, and reds are in good supply. We are very close to the end of the gold season. Granny Smiths remain in short supply and are the most expensive they've been all year.



Asparagus

Mexico's Central Mexico regions of Guanajuato, Dolores de Hidalgo, and Irapuato are still experiencing consistent rain. In the past couple of weeks, the weather has been cooler, with mornings at 50-60 degrees and highs at 70-80 degrees, which helps the asparagus spears' quality after all of the seeding. At the beginning of the season, the lack of rain and intense heat really affected the crowns, starting a slow decline by mid-August. Between mid-late August and September, there is still concern about a Mexico production gap. Markets are expected to be higher in the coming months.

In Peru, temperatures are colder, which is great for quality, but not for asparagus yields. As we head into Summer, Peruvian production is being impacted by El Nino and warmer than usual temperatures. This will result in lower yields and certainly affect quality. Expect the market to continue to be on the higher side.



Avocados

With Flora Loca harvesting increasing and Peruvian fruit arriving into the US, markets are slowly decreasing. The peak sizes are 60ct and smaller and 48ct and larger are tight. Due to lower dry matter in new crop fruit, ripening times are increasing.

Key Partners



Commodity Updates



Red and yellow peppers are finished out of Coachella and crop will begin production out of Bakersfield this week. East coast supply of green bells is adequate, there are some isolated quality concerns as a result of the weather, but overall quality is good. Newer areas including New Jersey have started out of Michigan and Ohio.



In California's West Coast growing regions, we continue to see better numbers due to warmer temperatures. There are still limited supplies, but they are improving daily.



Multiple growing regions are producing volume at this time. The Pacific Northwest, New Jersey and Michigan are all providing transferred fruit to various distribution points East and West. The market is softening.

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Commodity Updates



Berries (Raspberries)

It is expected that most shippers will see better numbers next week as West Coast production begins to produce slightly better yields. Until mid-August, availability will remain limited.



Berries (Strawberries)

This item is very limited due to a natural tapering off in production at the tail end of the plant cycle. Growers are experiencing fusarium disease pressure, which enhances this decline in yields in some ranches. By mid-August, new fall crop fruit should be available.



Broccoli

There has been an improvement in broccoli supplies in Santa Maria, Mexico, and Salinas this week, including florets. Quality is average, with Mexico fighting bug infestations. As we move into the weekend, we can expect this market to remain steady due to the volatile weather in Mexico and the recent heat wave in the Salinas Valley.

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Commodity Updates



Brussel Sprouts

As a result of erratic weather, Mexico continues to have quality issues, resulting in tight supplies. It is expected that the market will remain high and steady as the weekend approaches. As Salinas and Oxnard have started, low yields and smaller sizes have been reported due to seeders and discoloration. As the weekend approaches, supplies will remain tight.

Carrots

The main growing region is Kern County. Sizing is strong on conventional product. Availability is good across the board.

Cauliflower

Cauliflower supplies continue to be steady in Salinas, Mexico, and Santa Maria. As this market remains steady, we do not expect any issues with supplies going into the weekend.

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Commodity Updates



The market is softer with multiple shippers. The production in Salinas has increased, and the supply in southern California remains moderate. Overall, demand has declined. Large sizing has the best availability. Although value added product is still escalated, the mid mostly is decreasing on a day-to-day basis. We can expect steady supplies this week. The overall quality is above average with most suppliers.



District 2 is the main fruit-growing region and peaks on choice-grade fruit. Fruit is peaking on 115/95/75ct. Through the summer, 140ct-200ct will be strong. Small and fancy grade fruit are extremely limited. There is offshore fruit available on both coasts. In South Texas, Mexican products are available in a light way.



The prices are firm. Due to heat and humidity, The crop yields are down. The quality is fair. The number of US lime crossings through Texas has also declined. Crop is peaking on 230/250s. We can expect elevated markets through August.

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Commodity Updates



Due to the decrease in navels, Valencia's are the main variety. Peak sizes are 88ct-138ct. As school demand begins to pick up again, markets are steady to slightly higher.



In the eastern region, supply remains low due to rains and warm temperatures, and this trend is expected to continue until newer areas ramp up production. The primary region out west is Baja, with availability out of Washington as well.



The eastern supply is tight. The volume out of New Jersey is expected to pick up, and the quality is good. During the summer months, eggplant will be primarily grown in the San Joaquin Valley.

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Commodity Updates



Garlic

Mexican-grown supplies continue to be good this week on Green Onions. In Mexico, the warmer weather has helped spur growth. The quality is good overall.



Grapes (Green)

There is full production in California. The size is peaking at extra-large, and the quality is excellent. There are still quite a few Mexican grapes left at much lower prices.



Grapes (Red)

There is full production in California. The size is peaking at extra-large, and the quality is excellent. There are still quite a few Mexican grapes left at much lower prices.

Commodity Updates



Green Onions

Mexican-grown supplies continue to be good this week on Green Onions. In Mexico, the warmer weather has helped spur growth. The quality is good overall.

Kale

The market continues to be steady. The availability is expected to be moderate to good throughout the week. Overall, there is good quality and a stable market.

Lettuce Iceberg

Demand exceeds supply with this commodity, and this will continue for a few weeks. Several shippers began the week sold out. Shippers have run large retail ads, which is one reason for the shortage. Several production problems have been caused by very warm temperatures. The most common defects are puffiness, some internal burn, light weights, and misshapen heads. Within the next week, the value-added product will be escalated.

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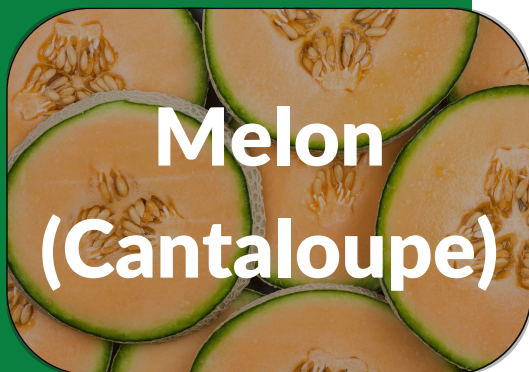
Commodity Updates



There is good availability of romaine as well as green and red leaf industry wide. There is a decline in demand. There is a good supply of romaine hearts, and shippers are flexing for large volume orders, so promote as much as possible. There have been some reports of tip burn on romaine and leaf items upon arrival. As a result of the windy conditions last week, there have been reports of twisting on romaine hearts. Overall, the quality has been above average, with good weights being reported.



As a result of the heavy rains that we had when growers were planting the product, the product in Salinas is still slightly behind schedule. The weather in the Salinas Valley has warmed up and we anticipate growth will increase over the next few weeks.



Although supplies are still available in the desert, the transition from the Imperial Valley and Yuma to the San Joaquin Valley has been completed. Cantaloupes are displaying excellent quality with great flavor, color, and size with supplies are selling out daily. Brix levels are still between 14-16%, and cantaloupes 9s/12s are ready for volume moves. Smaller fruit is limited but available with lead time. The high shell color and minimal rind allow for promotion opportunities on conventional and organic as volume increases.

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Commodity Updates



Melon (Honeydew)



From the San Joaquin Valley, honeydews are in full swing with steady volumes of 5s and 6.

Smaller fruit is limited but available with lead time. The quality of the fruit is excellent with Brix levels between 13-15%. The external skin is smooth and clean providing promotional opportunities on conventional and organics, 5s mainly. Volume is expected to steady for a few weeks.

Melon (Watermelon)



The market on California Watermelons has produced great results with retailers leading the charge. The heat wave continues to increase growth in the fruit and the quality remains high. Product is selling out daily with load volumes available. Brix levels in the 11-13% range.

Mushroom



The supplies are excellent, and the prices are competitive.

Commodity Updates



Onions

California and New Mexico have excellent supplies of jumbo, colossal, and super colossal yellow onions available for loading. Red onions remain active and escalated. Northwest harvest is expected to start in the next two weeks.



Pears

New crop of California bartletts will start harvest this week and packing at the end of the week. There are some Sunsprite varieties being shipped out of Lodi. Washington Anjous is nearly done.



Pineapples

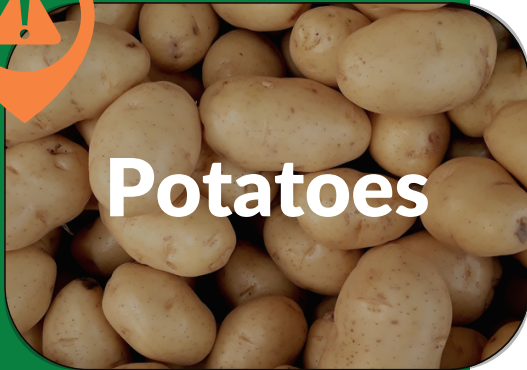
There is a light open market volume.

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Commodity Updates



Potatoes

The excellent growing conditions are reducing the risk of a gap between storage crop and new crop. Although pricing remains extreme, some relief is expected in the next few weeks.



Squash

There is good availability on both coasts, but quality is hit or miss depending on the region. There is an increase in production out of Michigan and Santa Maria.



Stone Fruit

Much better supplies of peaches this week versus a couple of weeks ago. Harvest is still peaking on 48s. There is good production of nectarines. Plums are in promotable volume. The cherry market in Washington is firming up.

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Commodity Updates



Tomatoes

Eastern production is increasing out of Tennessee/North Carolina, and seasonal volume is expected by the beginning of August. In the west, supplies are adequate, but rain in the beginning of the planting cycle will result in light production through next week. We may also see reduced yields from high temperatures during this past weekend's heatwave in California.

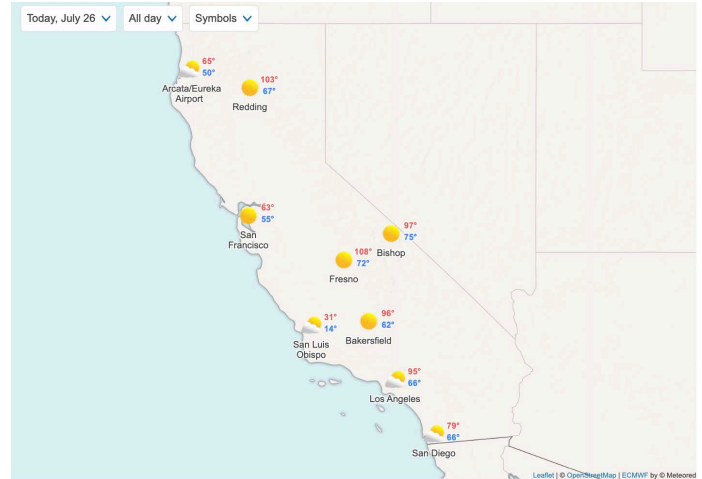
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Weather Updates



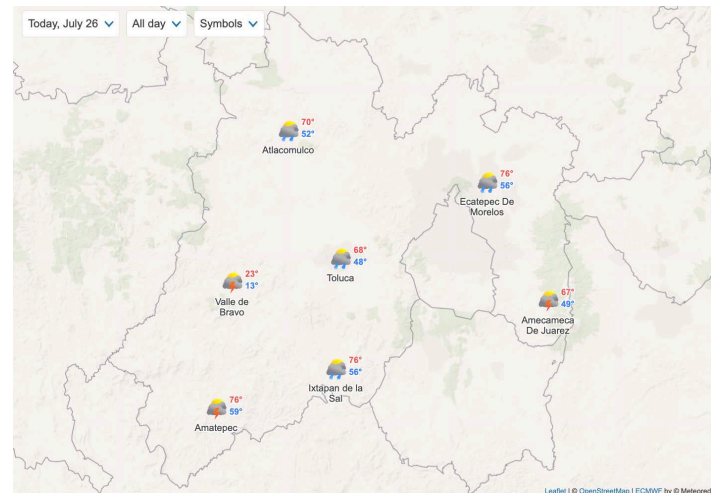
CALIFORNIA

This week, temperatures are near to above average due to high pressure. Mon-Tue will be a little warmer as the high strengthens, with morning lows in the low 50s to low 60s, daytime highs near the coast in the mid 60s to low 70s, mid 80s to low 90s in coastal valleys, and upper 90s to 105 inland. There is an increase in onshore winds Wednesday, which drops temperatures along the coast and inland, while coastal valleys cool to the upper 70s to mid 80s.



MEXICO

There may be isolated to scattered showers and thunderstorms on Tuesday into Wednesday, and more isolated showers are likely from Thursday through Saturday. Rain totals are expected to range from 0.05" to 0.30" in most showers, but some t-storms may produce higher totals. Through the weekend, maximum temperatures are expected to be mostly in the mid-70s to mid-80s across the region. From Saturday morning through Sunday morning, the morning temperatures will mostly be in the mid 50s to mid 60s.



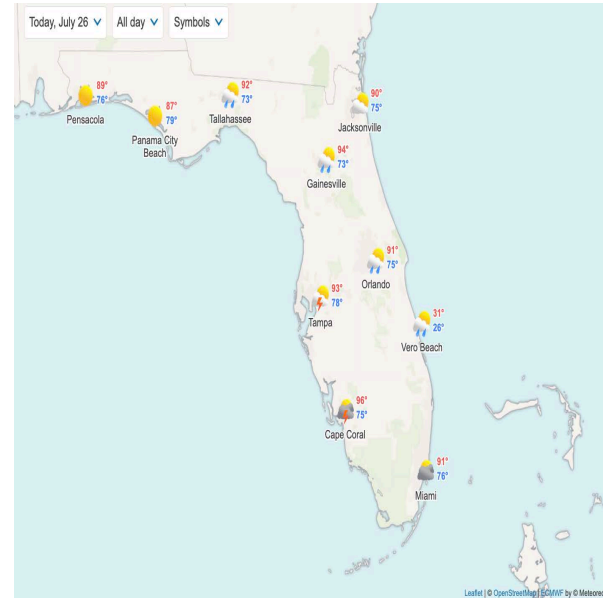
For more information: <https://www.ventusky.com/?p=31.4;-89.7;3&l=rain-3h>

Weather Updates



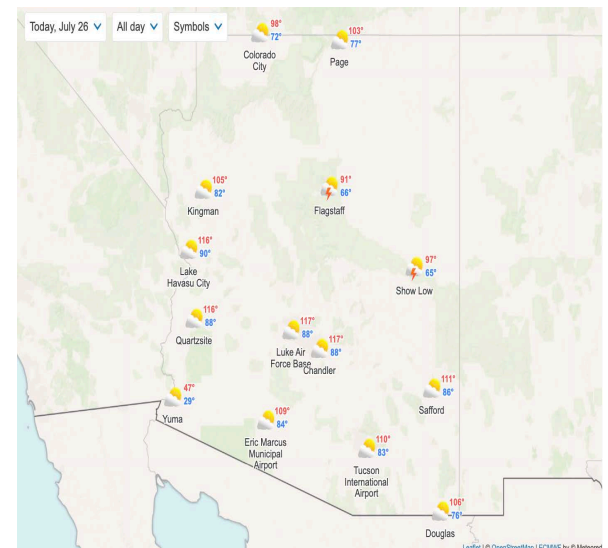
FLORIDA

Despite widespread showers and thunderstorms over northern and central Florida on Monday, the chances are much lower in the south due to the inflow of Gulf moisture. There will be scattered light showers possible most fields throughout the rest of the week, but it will likely be dry in the far north. The temperatures have cooled several degrees and are expected to remain near-to-above normal through Friday, with highs in the low to mid-90s daily, but likely cooler in the north counties Monday due to increased rain. This week, morning lows will be in the low-upper 70s.



ARIZONA

There is a chance for isolated to scattered thunderstorms early this week and again late this week due to an increase in moisture and storm dynamics. Monday and Friday have the best chances for rain with 0.15" of rain expected with each storm. Strong damaging winds over 50 mph and blowing dust are possible with heavy rainfall amounts of 0.30"+. High temperatures over the next five days will fluctuate a few degrees (Wed 110-116 degrees, Fri 108-114 degrees) with afternoon highs above seasonal averages. Morning lows Monday, mid 70s to mid 80s, cooling a few degrees Thu/Fri, low 70s to low 80s.



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

Freight Updates



Truck supply and fuel remain steady this week.



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

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

	07/10/23	07/17/23	07/24/23	Change from	
				week ago	year ago
U.S.	3.806	3.806	3.905	▲ 0.099	▼ -1.363
East Coast (PADD1)	3.858	3.879	3.971	▲ 0.092	▼ -1.328
New England (PADD1A)	4.074	4.081	4.100	▲ 0.019	▼ -1.439
Central Atlantic (PADD1B)	4.078	4.092	4.148	▲ 0.056	▼ -1.472
Lower Atlantic (PADD1C)	3.754	3.779	3.893	▲ 0.114	▼ -1.261
Midwest (PADD2)	3.742	3.726	3.814	▲ 0.088	▼ -1.427
Gulf Coast (PADD3)	3.505	3.506	3.640	▲ 0.134	▼ -1.271
Rocky Mountain (PADD4)	3.939	3.927	3.974	▲ 0.047	▼ -1.415
West Coast (PADD5)	4.460	4.465	4.555	▲ 0.090	▼ -1.427
West Coast less California	4.146	4.131	4.217	▲ 0.086	▼ -1.398
California	4.821	4.848	4.944	▲ 0.096	▼ -1.445

*prices include all taxes

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

Crop Insights

After a generally wet and cool spring and early summer out west the weather pattern has changed. July has seen generally above-average temperatures with a few short-duration heat waves of a couple of days in the coastal valleys of Central and Southern California. Interior valleys have seen some stronger heat waves with above-average temperatures as well. The warmer temperatures have helped increase growth rates in the region and many growers remain ahead of schedule in these fields. Warm, humid overnight temperatures are also affecting the quality of these fields. These warmer temperatures allow for continued growth overnight in these stands impacting texture and shelf life, especially in the processed items. Processed items will continue to have a reduced shelf life and should be used as quickly as possible, keeping a close eye on rotation. Insect populations continue to rise in warm temperatures as growers do their best to control the problem. Heavy rains this year have provided an abundance of habitat for breeding in the surrounding hillsides. This looks to be a continuing problem as the summer progresses. Heat-related defects will also likely be on the rise in the coming days as harvests roll on.

Today	104°/61°	 Sunny	0%	WNW 10 mph
Thu 27	100°/60°	 Sunny	1%	WNW 10 mph
Fri 28	100°/64°	 Sunny	1%	WNW 12 mph
Sat 29	100°/63°	 Sunny	0%	WNW 12 mph
Sun 30	100°/63°	 Mostly Sunny	0%	WNW 12 mph
Mon 31	99°/62°	 Partly Cloudy	0%	WNW 10 mph
Tue 01	98°/62°	 Partly Cloudy	0%	WNW 8 mph
Wed 02	96°/58°	 Sunny	0%	WNW 11 mph

<https://weather.com/weather/tenday//48b93e49a11f590ed49e1223fa2b66fe5d8e8c1b914049ea73b0b758a4e0e39f>

TIM LYNCH

QUALITY ASSURANCE

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