



MARKET TRENDS

FOR WEEK ENDING JUNE 23, 2017

 **PERFORMANCE**
FOODSERVICE



MARKET TRENDS

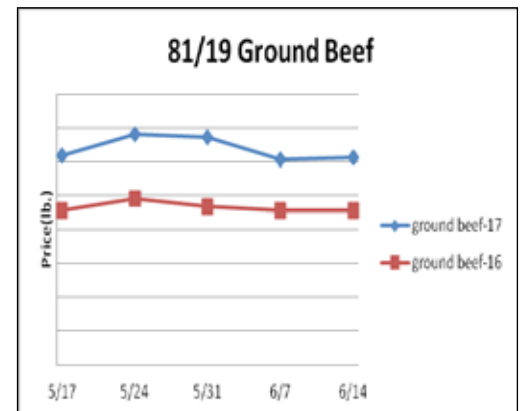
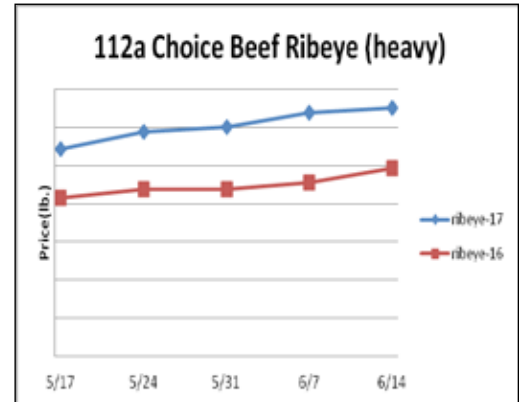
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Beef, Veal & Lamb

Beef output last week was 1.7% more than the same week last year. Near slaughter ready cattle supplies are anticipated to become more available this summer. Currently, October cattle futures are pricing at an 8% discount to the June contract. Thus, lower beef prices could be realized in the coming months as well. Forward choice ribeye (11%), choice strips (7%), select top butts (14%) and ground beef (10%) sales for delivery 22-90 days out are pricing this week well below the spot markets. U.S. beef imports during April were down 7.6% from last year and the smallest for the month since 2013. Continued lackluster imports should be supportive of imported lean beef trim prices this summer.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Increasing	Short	Higher
Ground Beef 81/19	Increasing	Good	Higher
Ground Chuck	Decreasing	Good	Higher
109 Export Rib (ch)	Increasing	Good	Higher
109 Export Rib (pr)	Increasing	Good	Higher
112a Ribeye (ch)	Increasing	Good	Higher
112a Ribeye (pr)	Increasing	Good	Higher
114a Chuck , Shlder Cld(ch)	Decreasing	Good	Higher
116 Chuck (sel)	Increasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Higher
116b Chuck Tender (ch)	Increasing	Good	Higher
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Increasing	Good	Higher
121c Outside Skirt (ch/sel)	Increasing	Good	Higher
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Increasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Higher
168 Inside Round (ch)	Increasing	Good	Higher
169 Top Round (ch)	Increasing	Good	Higher
171b Outside Round (ch)	Decreasing	Good	Higher
174 Short Loin (ch 0x1)	Increasing	Good	Lower
174 Short Loin (pr 2x3)	Increasing	Good	Higher
180 0x1 Strip (pr)	Increasing	Good	Lower
180 0x1 Strip (ch)	Increasing	Good	Higher
184 Top Butt, boneless (ch)	Increasing	Good	Lower
184 Top Butt, boneless (pr)	Increasing	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Higher
185c Loin, Tri-Tip (ch)	Increasing	Good	Higher
189a Tender (sel, 5 lb & up)	Decreasing	Good	Lower
189a Tender (ch, 5 lb & up)	Increasing	Good	Higher
189a Tender (pr, heavy)	Increasing	Good	Higher
193 Flank Steak (ch)	Decreasing	Good	Lower
50% Trimmings	Decreasing	Good	Higher
65% Trimmings	Decreasing	Good	Higher
75% Trimmings	Increasing	Good	Higher
85% Trimmings	Increasing	Short	Higher
90% Trimmings	Decreasing	Short	Higher
90% Imported Beef (frz)	Decreasing	Good	Higher
95% Imported Beef (frz)	Increasing	Good	Higher
Veal Rack (Hotel 7 rib)	Steady	Good	Lower
Veal Top Round (cap off)	Steady	Good	Lower



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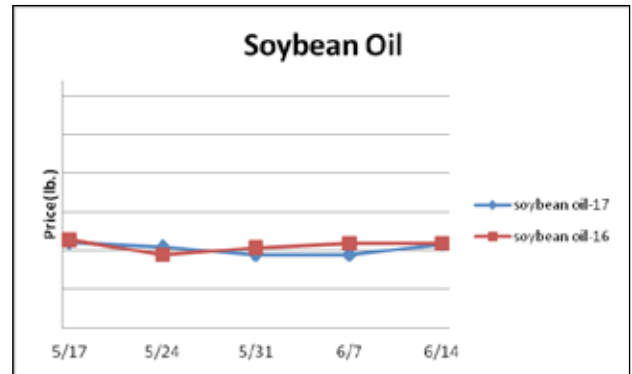
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Grains

U.S. soybean oil production during April was 6.3% larger than last year with end of month stocks up 11.1%. U.S. tallow output was 4.1% better than 2016 and holdings were larger by 8.4%. There is still a risk that the biodiesel blenders credit will be renewed in the coming months which would support food oil prices.

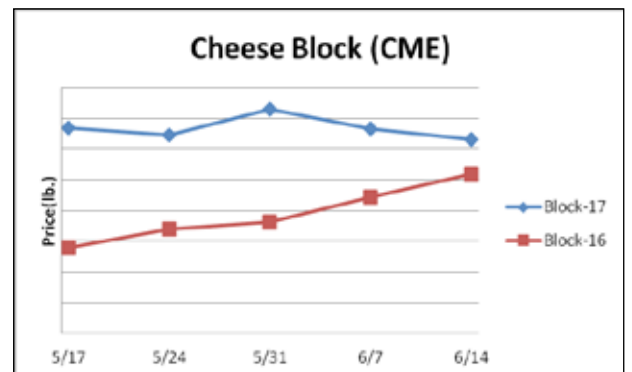
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Lower
Corn, bushel	Increasing	Good	Lower
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Steady	Good	Lower
Distillers Grain, Dry	Increasing	Good	Lower
Crude Palm Oil, lb BMD	Steady	Good	Same
HRW Wheat, bushel	Increasing	Good	Lower
DNS Wheat 14%, bushel	Increasing	Good	Higher
Durum Wheat, bushel	Increasing	Short	Higher
Pinto Beans, lb	Steady	Good	Lower
Black Beans, lb	Steady	Good	Higher
Rice, Long Grain, lb	Steady	Good	Lower



Dairy

The CME cheese markets have been relatively stable during the last week. Milk production has been seasonally strong in recent weeks but usually declines during the next few months which can bring support to cheese prices. The five-year average move in the CME cheese block market from now through the end of October is an increase of 9.5%. The butter market has firmed once again due in a large part to rising international butter prices and improved U.S. butter exports. History suggests that the greater price risk in butter this summer is to the upside.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Decreasing	Good	Lower
Cheese Blocks (CME)	Decreasing	Good	Higher
American Cheese	Decreasing	Good	Lower
Cheddar Cheese (40 lb)	Decreasing	Good	Higher
Mozzarella Cheese	Decreasing	Good	Higher
Provolone Cheese	Steady	Good	Same
Parmesan Cheese	Decreasing	Good	Higher
Butter (CME)	Increasing	Good	Higher
Nonfat Dry Milk	Increasing	Ample	Higher
Whey, Dry	Decreasing	Good	Higher
Class 1 Base	Steady	Good	Higher
Class II Cream, heavy	Increasing	Good	Higher
Class III Milk (CME)	Decreasing	Good	Higher
Class IV Milk (CME)	Increasing	Good	Higher



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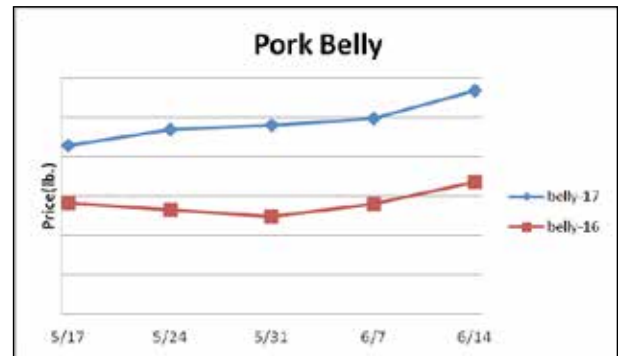
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Pork

Pork production last week was 4.1% bigger than the same week a year ago. Pork output is anticipated to seasonally decline in the near term but remain above 2016 levels. Further, Q3 2017 production is forecasted by the USDA to rise from Q2 by 195 million pounds, the largest increase for that period since 2009. This may temper any seasonal upward pricing pressure on the pork markets this summer. That said, belly supplies remain short which could be especially supportive of the belly markets during the next several weeks.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Increasing	Ample	Lower
Sow	Decreasing	Ample	Lower
Belly (bacon)	Increasing	Good	Higher
Sparerib(4.25 lb & down)	Decreasing	Good	Lower
Ham (20-23 lb)	Decreasing	Good	Lower
Ham (23-27 lb)	Increasing	Good	Lower
Loin (bone in)	Increasing	Good	Same
Babyback Rib (1.75 lb & up)	Increasing	Good	Lower
Tenderloin (1.25 lb)	Increasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Decreasing	Good	Higher
Picnic, untrmd	Increasing	Good	Higher
SS Picnic, smoker trm box	Increasing	Good	Higher
42% Trimmings	Increasing	Good	Higher
72% Trimmings	Increasing	Good	Higher



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Poultry

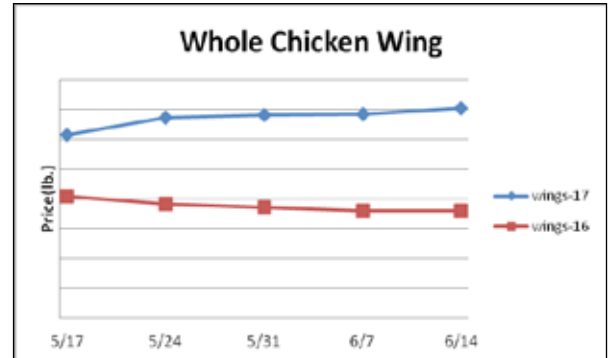
Chicken output for the week ending June 3rd was a whopping 4.5% larger than the same week last year but down substantially from the previous week due to the Memorial Day holiday. The six-week total for chicken production stands at 3% better than 2016 which is much better than the near 2% decline that occurred during April. Chicken producer margins have improved considerably this spring which could encourage year over year gains in chicken output in the coming months. However, the USDA is signaling that materially better chicken output expansion vs. 2016 may not occur until the fall. Chicken breast and wing prices remain historically inflated. But prices for both segments could be notably lower later this year.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Decreasing	Good	Higher
Wings (jumbo cut)	Increasing	Good	Higher
Wing Index (ARA)	Increasing	Good	Higher
Breast, Bnless Skinless NE	Decreasing	Good	Higher
Breast, Bnless Skinless SE	Decreasing	Good	Higher
Breast Boneless Index (ARA)	Decreasing	Good	Higher
Tenderloin Index (ARA)	Increasing	Good	Higher
Legs (whole)	Decreasing	Good	Higher
Leg Quarter Index (ARA)	Increasing	Good	Higher
Thighs, Bone In	Increasing	Good	Higher
Thighs, Boneless	Decreasing	Good	Higher

Description	Market Trend	Supplies	Price vs. Last Year
Whole Turkey (8-16 lb)	Decreasing	Good	Lower
Turkey Breast, Bnls/Sknl	Steady	Good	Lower

Eggs

Description	Market Trend	Supplies	Price vs. Last Year
Large Eggs (dozen)	Decreasing	Short	Higher
Medium Eggs (dozen)	Decreasing	Short	Higher
Liquid Whole Eggs	Steady	Short	Higher
Liquid Egg Whites	Steady	Short	Lower
Liquid Egg Yolks	Increasing	Short	Higher
Egg Breaker Stock Central	Steady	Short	n/c



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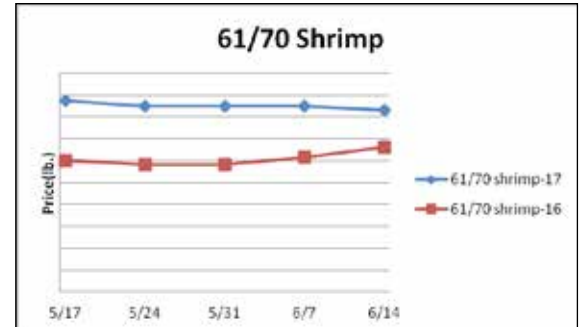
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Seafood

Elevated prices have encouraged salmon exports to the U.S. In April, the U.S. imported 19.3% more salmon than the prior year achieving a record for the month. Still, salmon imports from Canada were lackluster, down 5.8% from 2016. Eventually the better salmon imports should weigh on the salmon markets but any declines this summer may only be modest.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Decreasing	Good	Higher
Shrimp (61/70 frz)	Decreasing	Good	Higher
Shrimp Tiger (26/30 frz)	Steady	Good	Higher
Snow Crab Legs (5-8 oz frz)	Steady	Good	Higher
Snow Crab Legs (8oz & up frz)	Steady	Good	Higher
Cod Tails (3-7 oz frz)	Steady	Good	Same
Cod Loins (3-12 oz frz)	Steady	Good	Same
Salmon Portions (4-8 oz frz)	Steady	Good	Higher
Pollock Alaska, Deep Skin	Steady	Good	Same



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Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
WOOD PULP (PAPER)			
NBSK- Paper napkin	Increasing	Good	Higher
42 lb. Linerboard-corrugated box	Decreasing	Good	Higher
PLASTIC RESINS (PLASTIC, FOAM)			
PS-CHH-utensils, cups, to-go cont.	Steady	Good	Higher
PP-HIGP-heavy grade utensils	Steady	Good	Lower
PE-LLD-can liners, film, bags	Steady	Good	Higher

Retail Price Change from Prior Month

Description	Mar '17	Feb '16	Jan '16
Beef and Veal	Increasing	Increasing	Increasing
Dairy	Increasing	Decreasing	Decreasing
Pork	Increasing	Decreasing	Increasing
Chicken	Increasing	Decreasing	Increasing
Fresh Fish and Seafood	Decreasing	Decreasing	Decreasing
Fresh Fruits and Vegetables	Decreasing	Increasing	Increasing

Various Markets

The USDA is estimating 2017 tomato for processing acreage in California at 235,000, down 9.6% from the previous year and the smallest in at least 17 years. Output is forecasted to be the smallest since 2008. This could provide upward pressure to canned tomato prices this summer.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Decreasing	Good	Higher
Tomato Paste-Industrial (lb)	Decreasing	Good	Higher
Coffee lb ICE	Increasing	Good	Lower
Sugar lb ICE	Decreasing	Ample	Higher
Cocoa mt ICE	Increasing	Short	Lower
Orange Juice lb ICE	Increasing	Good	Lower
Honey (clover) lb	Steady	Good	Lower



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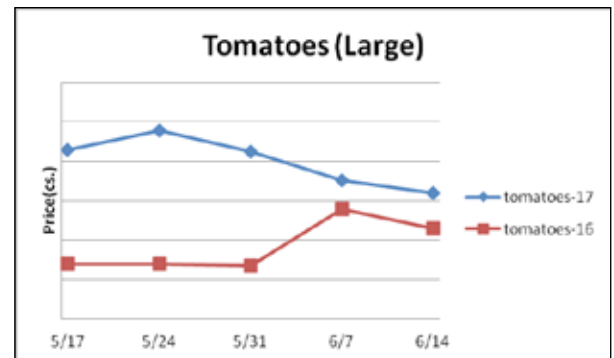
Produce

The Idaho potato markets continue to rise reaching multi-year highs. Potato supplies are seasonally tight which is supporting the markets. Recent history suggests that potato prices should move lower as the new harvest nears. The average price for the 70 count Idaho potato market during July was lower than in June in four of the last five years. At a minimum, sharply lower potato prices are expected by the fall. The cyclical transition north for the tomato harvest in the East has produced subpar supplies so far. Modestly lower tomato prices could occur in the coming weeks as Southeastern production expands. Lemons are still in a very EXTREME MARKET and we are seeing a shortage in supply. Garlic is still tight and we will need to substitute Mexican product. Lettuce is stable.

Eastern Veg: All the eastern growing regions continue to experience rain in the form of heavy afternoon thunderstorms. The weather forecast calls for additional rains this week for all growing regions. This type of weather almost always causes less than ideal quality and suspect shelf-life. Therefore, we suggest that dry vegetable inventories be kept as tight as possible until we work through this product.

MARKET ALERT

- **Avocados – ESCALATED**
- **Garlic – EXTREME**
- **Lemons – EXTREME**
- **Parsley – EXTREME**
- **Tomatoes – ESCALATED (ROUNDS ONLY)**
- **Watermelon – EXTREME**



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Produce

Apples & Pears

Expect small sizes to tighten through the summer. Sufficient storage supplies of Fuji, Gala, and Red Delicious Apples are available in Washington. The Golden Delicious and Granny Smith Apple seasons are nearly over. Quality is very good: sugar levels range from 14 to 18 Brix. Braeburn and Honeycrisp varieties are very scarce. California new crop Gala harvesting will begin in July. Pear prices are steady. The D'Anjou storage season will end soon. Large sizes (100-count and larger) dominate remaining stocks; small sizes are limited. Sugar levels range from 12 to 14 Brix. California Bartlett harvesting will start in July.

Artichokes

We are seeing high prices and average supply. Quality is good.

Arugula

Supplies of both baby and wild arugula are good, product is on the smaller size due to the recent cold weather.

Asparagus

Prices remain low. Mexican stocks are abundant; supplies are adequate in Michigan, Peru, and Washington. Quality is very good: spears are straight and flavor is pleasantly grassy.

Avocados

Expect an elevated market through the summer. Supplies are tight, especially large fruit (48-count and larger sizes). Quality is very good: texture is creamy and flavor is subtly nutty.

Bananas

Demand and quality are good and inventories are lighter this week.

Green Beans

EAST: GA continues to be the primary growing region. However, quality has become suspect and variable and supplies are very short. FOB prices are up over \$10 from last week.

WEST: The weather has not cooperated and supplies are very light. FOB prices have not jumped as much as in the east but are still up around \$5 from last week. We expect supplies to remain light until the end of June.

Berries:

Blackberries

Prices are unchanged. New crop California stocks are sufficient. Quality is very good, yet softness is a slight issue. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is poised to climb next week; the Mexican season has ended. Supplies will increase when the Oregon season starts in two weeks. Quality is very good: berries are plump and sweet, yet tangy.

Raspberries

Prices are low; California stocks are ample. The Mexican season has ended. Quality is very good: fruit is juicy and sweet. Sugar levels range from 13 to 14 Brix.

Strawberries

Prices are slightly higher than last week; California supplies remain plentiful. Quality is average: light rain showers have caused some water damage in certain lots. Harvesting crews are culling for best quality.

Bok Choy

Quality is good and we are seeing some higher quotes on WGA cartons.

Broccoli

Good green color. Tight crowns that pack up well. There is some occasional brown bead and pin rot. Overall quality is good.

Brussels Sprouts

Higher prices and tighter supplies remain but are leveling out. Quality is improving.



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Produce (continued)

Cantaloupe

We are going with good volumes out of the California and Arizona deserts and fruit looks excellent as the weather has been just about perfect through the growing season and starting to warm up now which is great and helps finish the fruit with good sugar and overall fruit strength. There is good supplies of Jumbo 9's and lighter supplies of 12's and smaller so the deals are the Jumbo 9's and again the fruit is beautiful. We will be in the desert region through June and then start up here on the Westside around the fourth of July, and might run into a small gap on these due to our cooler weather.

Carrots

There is a good supply with solid quality.

Cauliflower

The market is climbing; stocks are limited. Quality is very good, but bruising is a minor problem.

Celery

Good color, fresh and crisp with no major defects.

Cilantro

Quality is getting better but still seeing occasional decay and yellow leaf.

Corn

Georgia Sweet Corn is plentiful with promotional pricing available. White corn loading in the Central CA District now available with good volume. Expect to see holiday pulls start late next week!!

Cucumbers

EAST: GA fields continue to produce but the rains and old vines make quality suspect. Our new fields in NC have begun but they have also been hit with rains. FOB prices for supers are generally down slightly and the price for selects is currently generally steady from last week.

WEST: Crossings continue at Baja. For all practical purposes, Nogales is finished for the season. We are seeing upward pressures on FOB prices. Quality is generally good.

English Cucumber

Supplies from Eastern Canada are good while Nogales shippers should have English Cucumbers through next week.

Eggplant

EAST: GA supplies continue. Prices for fancy are down moderately and are steady to down slightly for choice.

WEST: Supplies continue from the desert. FOB prices are generally down slightly again this week.

Fennel

Supplies for the week will be light.

Ginger

Chinese ginger is in good supply. It is being offered at a substantial discount compared to ginger from Brazil.

Grapes

We are going out of Mexico and Coachella Valley now on both red and greens, the weather has turned and volumes have started to increase and there is ample supplies of fruit out of both Coachella and Mexico and we should see good supplies for the next 2 weeks then we will hopefully start around the first week of July here in the central valley. Our weather here in the central valley has been cooler than normal, so we will hope for some warmer weather to help push the fruit but a possibility we may not start until the second week of July. The overall quality out of each area is good but size looks to be about a 16th smaller overall on all varieties versus last year, but very nice clean crisp fruit. The overall estimate for Mexico is slightly larger crop than last year but will probably come up less than the 20 million estimated million cartons. Also out of Coachella their volume will be a bit lighter than last year as well. Higher temps in the desert this coming week we may start to see a little heat damage. We will have good volume out of the central valley once we get started and that will take us into December.

Green Cabbage

Green cabbage has improved, supplies are good and quality is good in the east as well as the west. Volume incentives are available out of Georgia.

Red Cabbage

Quality and sizing have been great, with good color. Overall, the market is strong.



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Produce (continued)

Green Onions

Iced: Prices are good and there is plenty of product.
Iceless: This market is steady with good volume.

Honeydew

Market very strong with light supplies out of all regions, Imperial Valley, Arizona and Mexico the fruit is peaking on 5's and 6's with very light supplies of 8's out of all regions. The fruit out of Mexico has been beautiful but with the cooler weather the sugars are not near what they are coming out of California and Arizona desert regions. The weather however is starting to warm up so we will see better sugars by the first of next week. The overall quality of the fruit is very nice with a nice green to cream exterior and nice deep green interior color, the fruit is very strong out of all regions. We expect to see a small gap on honeydews between the Westside and the desert regions as our weather here on the Westside has been cooler and probably not see any volume until at least the 4th of July.

Jicama

Normal prices and quality is good.

Kale (Green)

Demand is steady and quality is better.

Kiwi

Supplies are good. We are still seeing slightly higher prices with quality being average.

Lemons

Market extremely strong and demand far exceeds supply on all sizes and grades. The overall quality is good to fair, with some clear rot showing up due to all the moisture in the ground and warmer weather which promotes mold spores. We will see the market continue to increase as demand has been very good across the board, this will be the trend as we start heading further into the spring and into summer which is normal, but this situation is about a month earlier than last year. We are finished here in dist. 1 and now dependent upon only dist. 2 fruit, we have started to get some Chilean fruit in



but only very light volume with better volumes coming the later part of next week and then should see steady volume arriving around the second week of July going forward. Mexico will be starting around the first of August going through October. We expect the market to keep strengthening and also supplies continuing to be very limited.

Lettuce:

Butter

Prices are good and supply is good.

Green/Red/Varieties

The market is near the bottom; stocks are ample. There is some shorter sizing but full heads. Also there is some fringe burn and mildew. Overall texture is good.

Iceberg

Some inconsistent sizing and solidity. Mildew is affecting wrapper leaf and some cap leaves causing crews to trim product making lettuce slightly more pale than usual. Overall good texture.

Romaine

Good sizing, some cupping, internal burn & fringe burn. Mildew is largest problem as the mildew is working its way towards the heart making it hard for field crews to trim out on final pack. Overall texture is good.

Romaine Hearts

Romaine Hearts have been medium green with some light wind burn and trace internal burn.

Limes

The market is level; supplies are plentiful, particularly small fruit. Rainy weather is causing stilar issues, but crews are sorting for best quality.

Napa

Supplies are improving, WGA is not available.

Onions

Strong production with only moderate demand is the reason the yellow market is weaker again this week. There will be limited changes in the reds and whites. Growers in NM still believe the market is destined to improve by the end of the month as supplies will weaken a bit. Quality and sizing has been outstanding this week making it a great time to promote new crop onions.

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Produce (continued)

Oranges

Market is getting stronger on all sizes fancy and choice as navel all but finished and Valencia is the main variety. The fruit quality is good right now with excellent color and sugar and fairly firm as our weather has not been excessively hot which will cause the fruit to soften up and also start to re-green. This year's Valencia crop is going to come up short as well and some of the most recent estimates are about 15-20% lighter than last year so we will see some strong prices starting out and do not expect to see things come off much but we will keep you posted as we go forward. Also with this lighter Valencia crop we are going to experience very light supplies on 113's and smaller through the summer and we expect August through mid-October until we start navels again, that we will be in a demand far exceeding supply on the smaller fruit.

Parsley (Curly, Italian)

EXTREME- We are seeing prices that are very high and in escalation. Quality is average.

Green Pepper

EAST: GA continues to be primary producer. FL fields also continue to produce and our eastern NC fields have just come on-line. The rains have taken a toll on quality. FOB prices have remained generally steady trading in a narrow range for all sizes and grades.

WEST: Supplies remain tight but the Bakersfield crop is slowly ramping up. The market remains active. However, current FOB prices are down slightly from last week.



Jalapeños

EAST: Better supplies out of GA. FOB prices are down slightly again this week.

WEST: Baja crossings continue. Supplies have tightened putting upward pressures on FOB prices. The Santa Maria crop is about a week away.

Red & Yellow Pepper

WEST: FOB prices are higher this week and we are expecting an upcoming gap in supplies as the desert harvest is winding down. This will continue to put upward pressures on prices for the next week or two.

Pineapple

The market is unchanged. Volume is high in both areas; large sizes are especially ample. Quality is very good: fruit is juicy and tangy, yet sweet. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

Idaho is still in a demand exceed supply situation on 70cts and larger. The most recent increase in demand is coming from buyers who had been sourcing in other states and are finding those supplies even more difficult to secure than Idaho. Current Burbank supplies are still very heavy to the smaller sizes which is why we are not seeing an aggressive market on 90cts and smaller.

Radishes

Quality is good and supply is slowing down.

Salad Iceberg Blends

Iceberg at the processing level is still firm to hard causing issues with chunks. There is still some internal burn and mildew damage. Overall condition is good but not great limiting some private label being available.

Chopped Romaine/Romaine Blends

There are issues of internal burn, fringe burn and mildew. Romaine is growing tight in the core which is causing issues with what seems like core due to the heart staying intact after processing.

Snow and Sugar Snap Peas

Snow and sugar snap peas are in high demand with good quality.

Spinach (Baby)

Baby and clipped spinach supplies are good. Quality is good, with good prices. There are some reports of mildew.

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Produce (continued)

Spinach

Overall condition is good. There are some brittle varieties causing mechanical damage after processing. Private branded availability may be inconsistent due to the mechanical damage.

Spring Mix

The market is level; Salinas Valley volume is high. New crop quality is excellent, but leaf size is larger than normal in some fields.

Green Squash

EAST: Supplies are available from GA, SC and NC. Prices for both fancy and medium are down moderately from last week. See note above concerning quality.

WEST: Various regions continue to harvest green squash. FOB prices are down again this week.

Yellow Squash

EAST: Supplies available from GA, SC and NC. FOB prices for both fancy and medium are higher compared to last week. All three areas have gone through rains and we are concerned about quality and shelf-life.

WEST: Supplies have improved. The quality of the Santa Maria product is good. FOB prices are down from last week.

Tomatoes

EAST:

Rounds

Eastern tomatoes continue to be sourced from the panhandle of FL, south GA and the coastal region of SC. Each of the growing regions has received a lot of rain over the past week with more expected this week, especially in the south GA and FL regions. Quality has definitely suffered from the rain; however, the quality of tomatoes has held up better than expected having gone through so much rain. Nevertheless, shelf-life remains suspect and inventories should be kept as tight as possible. Demand continues to be relatively weak and FOB prices continue to fall. Expect prices for all sizes to be down a little from last week. Contract pricing for all sizes have fallen below trigger price points and will return to the fixed contract levels.

Romas

Romas are the one tomato commodity whose supplies are tight and the market active and higher. FOB prices are up depending on size. Quality continues to be variable.

Grapes

Our SC fields continue to produce improving supplies as demand remains weak. FOB prices are down moderately. Quality remains generally good but becoming more variable.

Cherries

Supplies have improved and demand remains weak. FOB prices are down again this week.

WEST/MEXICO:

Rounds

Mature green FOB prices are generally steady on all sizes. A few more CA growers are starting up in a light way with more scheduled to start harvesting later this week. Demand remains weak. Vine-ripes continue to cross at Baja but very few are crossing at McAllen and Nogales is practically finished for the season. Demand for vine-ripes is slow.

Romas

Crossings at both Baja and McAllen have lightened this week. The weather the past week in Baja has caused a slowdown in growth and harvesting. FOB prices are up off the floor from last week on XL and large sizes. Mediums have not increased as much. We expect this price spike to be very temporary as the weather has become more favorable and normal harvesting should return soon.

Grapes

Supplies have ramped up at Baja and demand continues to be weak which has caused FOB prices to fall again this week.

Cherries

Supplies are not as plentiful this week which has caused FOB prices to increase from last week.

Watermelon

Prices are weak; supplies are abundant. Quality is excellent: color is deep red, texture is firm, and flavor is sweet, yet refreshing. Sugar levels average 11 Brix.

Tree Fruit

The market has stabilized; apricot, nectarine, peach, and plum stocks have increased. Nectarine sugar levels range from 10 to 12 Brix; peach levels vary from 10 to 11 Brix and red plums are very sweet at 13 to 15 Brix.

