



# MARKET TRENDS

FOR WEEK ENDING JUNE 9, 2017

 **PERFORMANCE**  
FOODSERVICE



# MARKET TRENDS

JUNE 9, 2017

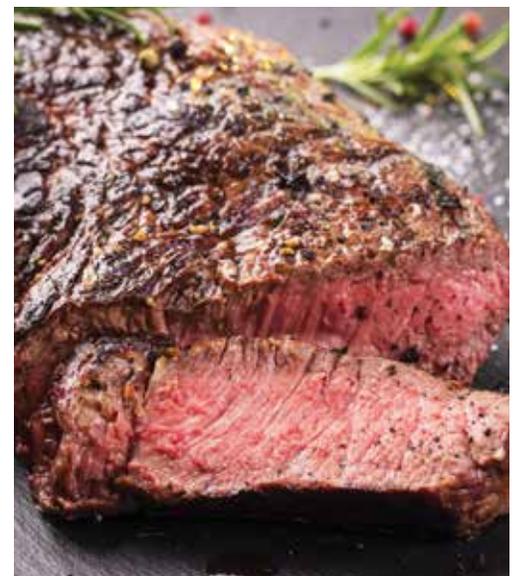
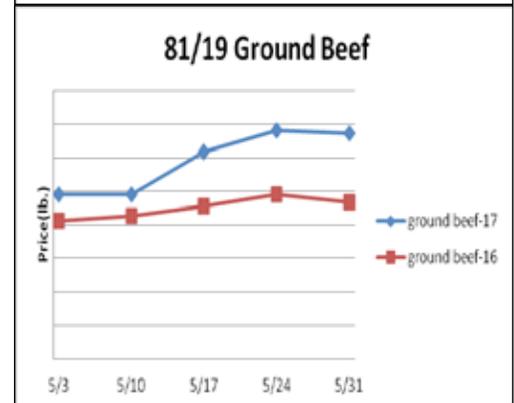
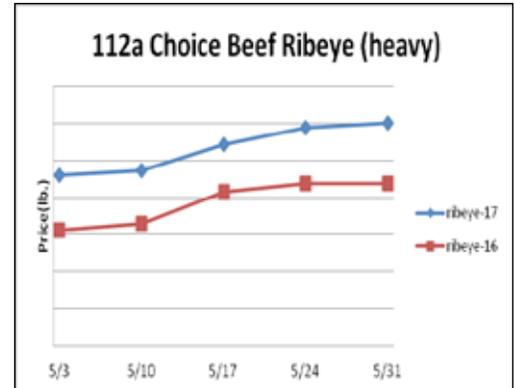
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## Beef, Veal & Lamb

Beef output last week rose 1.3% and was 2.6% larger than the same week last year. Recent cattle on feed data suggests that solid year over year gains in beef output should occur in the coming months. According to the USDA, the May 1st U.S. cattle on feed inventory was 2% larger than the prior year while cattle placements into feedlots during April were up 11.1% and the biggest for the month since 2003. Still, the average cattle placement weight was 2.7% lighter than 2016 which suggests that cattle slaughter weights could remain below a year ago. If true, this could temper the seasonal downside in the 50% beef trim market. Beef prices are expected to soften in the near term.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Decreasing	Short	Higher
Feeder Cattle Index (CME)	Increasing	Short	Higher
Ground Beef 81/19	Decreasing	Good	Higher
Ground Chuck	Increasing	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)	Decreasing	Good	Higher
114a Chuck , Shlder Cld(ch)	Increasing	Good	Higher
116 Chuck (sel)	Increasing	Good	Higher
116 Chuck (ch)	Increasing	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)	Decreasing	Good	Higher
121e Cap & Wedge	Increasing	Good	Higher
167a Knuckle, Trimmed (ch)	Increasing	Good	Higher
168 Inside Round (ch)	Increasing	Good	Higher
169 Top Round (ch)	Increasing	Good	Higher
171b Outside Round (ch)	Increasing	Good	Higher
174 Short Loin (ch 0x1)	Decreasing	Good	Lower
174 Short Loin (pr 2x3)	Increasing	Good	Higher
180 0x1 Strip (pr)	Decreasing	Good	Lower
180 0x1 Strip (ch)	Increasing	Good	Higher
184 Top Butt, boneless (ch)	Decreasing	Good	Lower
184 Top Butt, boneless (pr)	Increasing	Good	Lower
184-3 Top Butt, bnls (ch)	Decreasing	Good	Lower
185a Sirloin Flap (ch)	Decreasing	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)	Decreasing	Good	Lower
189a Tender (pr, heavy)	Decreasing	Good	Higher
193 Flank Steak (ch)	Decreasing	Good	Lower
50% Trimmings	Decreasing	Good	Higher
65% Trimmings	Increasing	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)	Increasing	Good	Lower



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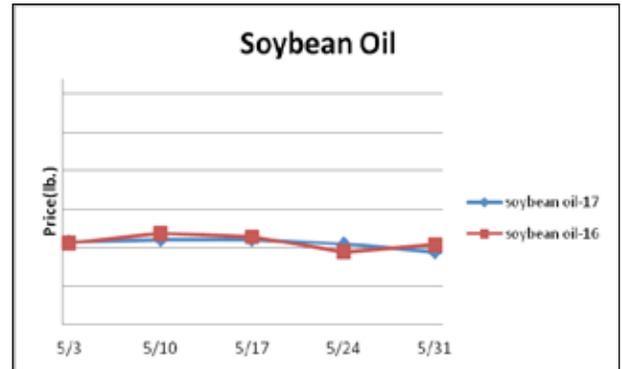
JUNE 9, 2017



## Grains

The 2017-18 corn, soybean and wheat crops have had several bouts of adverse weather during the last six weeks. However, planting progress and crop condition ratings have been surprisingly good. This has helped push soybean prices downward. The grain markets could find support in the not-so-distant future, however.

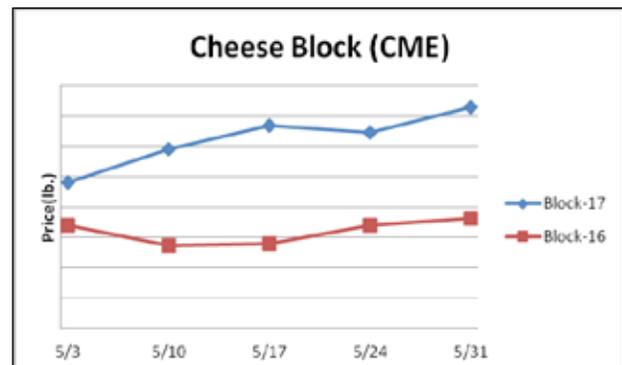
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Lower
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Lower
Distillers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



## Dairy

The CME cheese markets have found support due to firming world prices and better U.S. exports. Still, April 30th cheese stocks were 10.4% bigger than 2016 and a record. Further, the cheese inventory grew in April by the largest amount in 18 years. This, and deflated nonfat dry milk prices may limit the upside in the cheese markets this summer. The CME butter markets are firm as well. April 30th butter holdings were 1.2% less than the previous year. Further, the seasonal build in supplies were slowed. The downside for butter prices is likely only modest during in next few months.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Higher
Cheese Blocks (CME)	Increasing	Good	Higher
American Cheese	Decreasing	Good	Higher
Cheddar Cheese (40 lb)	Increasing	Good	Higher
Mozzarella Cheese	Increasing	Good	Higher
Provolone Cheese	Steady	Good	Same
Parmesan Cheese	Increasing	Good	Lower
Butter (CME)	Decreasing	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)	Increasing	Good	Higher
Class IV Milk (CME)	Increasing	Good	Higher



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JUNE 9, 2017

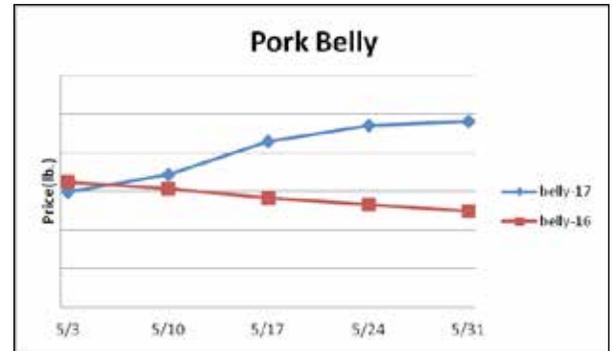
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## Pork

Pork production last week declined 2.9% but was .3% larger than last year. Hog slaughter was the smallest for any non-holiday week in 10 months which is along seasonal patterns. April 30th pork holdings were 6% smaller than the prior year with picnics (26%), hams (12%), loins (1%), trim (1%), and bellies (53%) all lower. Belly stocks were the smallest for the month on record. This and seasonally declining pork output could be especially supportive of pork belly prices during the next few months

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)	Increasing	Good	Lower
Ham (20-23 lb)	Increasing	Good	Higher
Ham (23-27 lb)	Decreasing	Good	Lower
Loin (bone in)	Increasing	Good	Lower
Babyback Rib (1.75 lb & up)	Decreasing	Good	Lower
Tenderloin (1.25 lb)	Increasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Increasing	Good	Higher
Picnic, untrmd	Decreasing	Good	Higher
SS Picnic, smoker trm box	Decreasing	Good	Higher
42% Trimmings	Increasing	Good	Higher
72% Trimmings	Increasing	Good	Higher



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JUNE 9, 2017

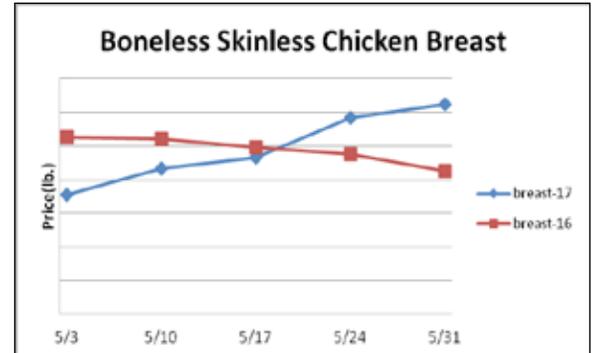
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## Poultry

Chicken output for the week ending May 20th declined .3% but was 2.3% larger than a year ago. The four-week total of chicken production stands at 2.7% above 2016. April chicken output was nearly 3% less than the previous year. Solid seasonal demand is pushing many of the chicken markets higher. The ARA Chicken Cutout Index and Boneless Skinless Chicken Breast Index both have risen to their most expensive levels in two years. However, better year over year gains in chicken production could temper any further upward price moves in chicken during the summer. The May 1st table egg laying flock was 2.1% larger than last year but declined from the previous month. Egg prices may remain above 2016 levels.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Increasing	Good	Higher
Wings (jumbo cut)	Increasing	Good	Higher
Wing Index (ARA)	Decreasing	Good	Higher
Breast, Bnless Skinless NE	Increasing	Good	Higher
Breast, Bnless Skinless SE	Increasing	Good	Higher
Breast Boneless Index (ARA)	Increasing	Good	Higher
Tenderloin Index (ARA)	Increasing	Good	Lower
Legs (whole)	Increasing	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)	Steady	Good	Lower
Turkey Breast, Bnls/Sknl	Increasing	Good	Lower

## Eggs

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



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JUNE 9, 2017

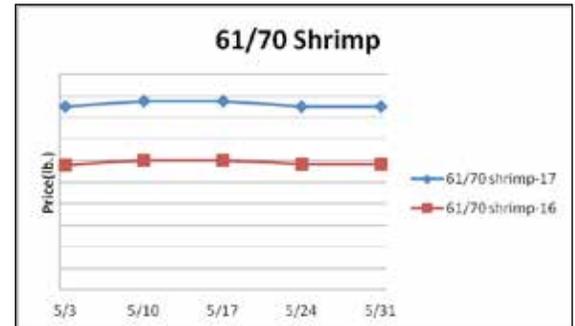
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## Seafood

Seafood retail prices during April declined .7% from the prior month and were essentially flat with the same month last year. They were the lowest since August. Although lower retail prices will encourage U.S. consumption, alternative protein retail prices including beef and pork are well below 2016. This may temper wholesale seafood prices.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Steady	Good	Higher
Shrimp (61/70 frz)	Steady	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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JUNE 9, 2017

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FOODSERVICE



## Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
<b>WOOD PULP (PAPER)</b>			
NBSK- Paper napkin	Steady	Good	Higher
42 lb. Linerboard-corrugated box	Steady	Good	Higher
<b>PLASTIC RESINS (PLASTIC, FOAM)</b>			
PS-CHH-utensils, cups, to-go cont.	Decreasing	Good	Higher
PP-HIGP-heavy grade utensils	Steady	Good	Higher
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	Decreasing	Decreasing	Increasing
Pork	Decreasing	Increasing	Increasing
Chicken	Decreasing	Increasing	Increasing
Fresh Fish and Seafood	Decreasing	Decreasing	Decreasing
Fresh Fruits and Vegetables	Increasing	Increasing	Increasing

## Various Markets

Orange juice futures have fallen sharply in recent months despite the historically small Florida orange crop. Brazil continues to garner more world market share for orange juice and demand has been lackluster in the U.S. However, orange juice futures could find support soon.

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



# MARKET TRENDS

JUNE 9, 2017

**PERFORMANCE**  
FOODSERVICE

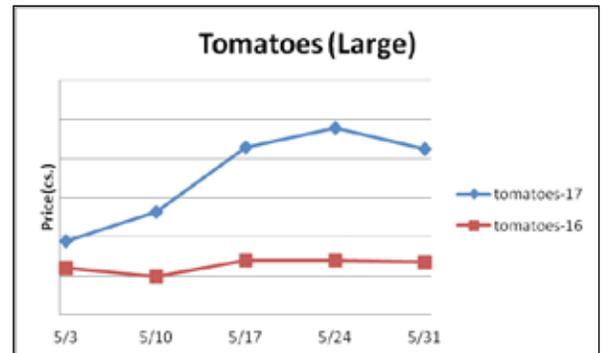


## Produce

Idaho potato prices are on the rise with the 70-count market climbing to its most expensive level since July 2015. But, history suggests that the upside potential in the potato markets is likely only moderate from here. The five-year average move for the 70-count Idaho potato market during the next six weeks is a decline of 14.3%. But potato prices may not fall to substantially below that until the late summer when the major harvest season gains momentum. Tomato supplies remain subpar as the chief harvest areas transition north in both the East and the West. Tomato prices typically remain firm during June. Lettuce is a little higher in price this week. Celery, lemons and oranges are still in a very EXTREME MARKET and we are seeing a shortage in supply. Garlic is still very tight. Limes are a good buy! Iceberg lettuce production has recently fallen 20% and will remain as such through all of next week. The market has bounced noticeably off the market floor since Friday, May 26th. Prices are expected to climb. This market rise is strictly supply driven. Salinas celery shippers are off to a slow start. More shippers will begin their Salinas season next week. The market is expected to adjust considerably by the end of next week. To everyone's surprise the broccoli market has pushed higher since early this week. The roller coast of supplies and prices will continue over the next few weeks.

## MARKET ALERT

- **Avocados – EXTREME**
- **Celery – EXTREME**
- **Cilantro – ESCALATED**
- **Garlic – EXTREME**
- **Lemons – EXTREME**
- **Oranges – EXTREME**
- **Parsley – EXTREME**
- **Tomatoes – EXTREME**



# MARKET TRENDS

JUNE 9, 2017

**PERFORMANCE**  
FOODSERVICE



## Produce

### Apples & Pears

Although the market for large sizes is low, prices for small fruit are climbing. Sufficient storage supplies of Fuji, Gala, and Red Delicious Apples are available in Washington. The Golden Delicious and Granny Smith Apple seasons are wrapping up. Quality is very good: sugar levels range from 14 to 18 Brix. Braeburn and Honeycrisp varieties are almost depleted. New crop Gala production will start in California in July. Prices are level. D'Anjou storage supplies are plentiful. Sugar levels range from 12 to 14 Brix. California Bartlett harvesting will start in July.

### Artichokes

We are seeing very high prices and very short supply. Quality is good.

### Arugula

Supplies of both baby and wild arugula are light but increasing.

### Asparagus

Weak prices persist. Mexican stocks are abundant; supplies are sufficient in Peru and Washington. Quality is very good: spears are straight and flavor is pleasantly grassy.

### Avocados

The market is high. Supplies remain scarce, particularly large fruit (48-count and larger sizes). Quality is very good: texture is smooth and flavor is nutty.

### Bananas

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

### Berries:

#### Blackberries

Prices are level. The Mexican season has nearly ended. New crop California stocks continue to increase. Quality is very good, yet softness is a sporadic issue. Sugar levels range from 12 to 13 Brix.

#### Blueberries

The market has eased. Supplies are most plentiful in California and Georgia; North Carolina volume is increasing. Quality is very good in all regions: berries are plump and sweet, yet tangy.

#### Raspberries

Prices are unchanged; Mexican supplies are most plentiful. New crop California volume is increasing. Quality is very good: fruit is juicy and sweet. Sugar levels range from 13 to 14 Brix.

### Strawberries

The market is steady; volume is high. Quality is very good: fruit is sweet and juicy. Long-stem berries are on the market.

### Green Beans

EAST: GA continues to be the primary growing region. However, quality has become suspect and variable. FOB prices are slightly higher.

WEST: FOB prices are down slightly again this week.

### Bok Choy

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

### Broccoli

Stocks are ample in Salinas and Santa Maria, California. Mexican supplies are a bit tighter (into South Texas). Crowns are deep green and compact; flavor is subtly earthy. Quality is very good: yellowing is a minor problem. To everyone's surprise the broccoli market has pushed higher since early this week. The roller coast of supplies and prices will continue over the next few weeks.

### Brussels Sprouts

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

### 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 9's and lighter supplies of 12's and smaller so the deals are the 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 first of July.



# MARKET TRENDS

JUNE 9, 2017

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Carrots

There is a good supply with solid quality.

### Cauliflower

The market is weak; stocks are slightly tighter than last week. Quality is very good: color is snowy white and curds are compact.

### Celery

High prices persist; stocks are scarce. Quality is very good: seeder remains an occasional problem.

### Cilantro

Quality is variable as there is still yellowing with some decay. Prices are moderate.

### Corn

Florida Sweet Corn is plentiful with promotional pricing available. Supplies are light out of Coachella on yellow, bi and while. Quality is outstanding.

### Cucumbers

EAST: GA product is winding down and in short supply. Our eastern NC fields are scheduled to begin Thursday of this week. However, the region was hit with a tornado last night and power has not been yet restored. FOB prices currently are down from where they were last week but the weather could make for a dicey market as the week continues.

WEST: Supplies continue to cross at Nogales but should end by the end of the week or early next week. Baja continues to get ramped up. FOB prices are currently steady with downward pressure.

### English Cucumber

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

### Eggplant

EAST: More GA supplies are available. Prices are steady with downward pressure.

WEST: Nogales crossings and the desert continue. FOB prices are generally down from last week.

### Fennel

Supplies for the week will be light.

### Garlic

The overall supply of garlic is very, very tight. The 2017 crop is still lagging behind.

### 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 2-3 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 estimates for Mexico is slightly larger crop than last year around 20 million cartons estimated so there should plenty of fruit to come across, but at this point estimates are coming up shorter. Also out of Coachella their volume will be a bit lighter than last year as well. 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.

### Green Onions

Iced: This market has leveled off with steady crossings last week. The crossings should remain at current levels with good supplies.

Iceless: This market has leveled off and should remain steady. Contracts and pre-commitments are holding the market firm.



# MARKET TRENDS

JUNE 9, 2017

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Honeydew

Market steady with good supplies coming out of Mexico, Imperial Valley and Arizona the fruit is peaking on 5's and 6's with 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.

### 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 until we see the Chilean fruit arrive around the first or second week of June and they will increase their volume by mid-July and then Mexico 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 down and supply is good.

#### Greenleaf/Variety Lettuce

The market is near the bottom; new crop stocks are ample in the Salinas Valley. Quality is very good: internal burn is being caused by hot weather.

#### Iceberg

Iceberg lettuce production has recently fallen 20% and will remain as such through all of next week. The market has bounced noticeably off the market floor since Friday, May 26th. Prices are expected to climb. This market rise is strictly supply driven.

#### Romaine

The market is weak; Salinas Valley stocks are ample. Quality problems persist: growers must trim heads heavily to remove fringe burn and internal burn caused by high temperatures.

#### Romaine Hearts

Supplies are good, prices are down. Quality is good.

#### Limes

The market is steady; supplies are ample, especially small sizes. Warm, dry weather conditions are causing occasional spotting and sizing issues, but growers are sorting for quality.

#### Napa

Supplies are normal. Quality is good.

#### Onions

Pricing has dropped on all sizes and colors of onions as Texas, New Mexico, and California are all shipping. The Imperial Valley growing area in California is winding down and the San Joaquin growing region is starting. Size profiles are a good mix across the board with most of the production occurring on Jumbo Yellows. We anticipate plentiful supplies for the month of June, which should help control pricing. There are gaps expected in both New Mexico and California for July, so it is expected we will see a spike in price during this time.

#### Oranges

Market is very strong on 113's and 138's fancy and choice as we are still in some of our late navel varieties that will be on the larger side. The fruit quality is good right now with excellent color and sugar and the fruit eats like candy, we are starting to see some puff and crease and some softer fruit due to the excessive amount of rains and the warm weather we have experienced. We are starting to see some fruit drop

# MARKET TRENDS

JUNE 9, 2017

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

as well due to the bloom we are experiencing and the tree is trying to take care of the new set and the weaker fruit hanging on the tree will drop on navels. We will for sure come up short of our original estimates for this year's navel crop, but will have supplies probably through May and not stretch it into July like last year. We have started Valencia's and this year's crop looks like it 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 probably 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

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

### Green Bell Pepper

EAST: GA continues to be primary producer. Supplies are sufficient and FOB prices are currently down slightly from last week.

WEST: The desert continues to produce but is coming to the end of the crop. Bakersfield should start to produce sometime next week. FOB prices are generally down slightly this week.

### Jalapeño Pepper

EAST: Better supplies out of GA. FOB prices are down slightly. Quality is improving.

WEST: Better supplies have cause FOB prices to fall slightly this week.



### Red & Yellow Pepper

The market is steady; volume is average. California growers are harvesting in Coachella. The Mexican season will run another one to two weeks; the market will climb after that. Domestic quality is excellent: color is vibrant and flavor is spicy, yet sweet.

### Pineapple

The market remains weak. Stocks are abundant in both areas, especially large sizes. Quality is very good: fruit is juicy and tangy, yet sweet. Sugar levels range from 13 to 16 Brix.

### Idaho Potatoes

The market for large sizes (40- through 70-count stocks) are higher than those for small sizes (80- to 100-count supplies). Norkotah potatoes are no longer on the market. The Burbank variety will be shipped until new crop, field-run Norkotahs become available in August.

### Radishes

Quality is good and supply is slowing down.

### Salads & Blends

Prices are level. Raw product iceberg and romaine supplies are abundant. Quality is very good, although core pieces are a sporadic problem.

### Snow and Sugar Snap Peas

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

### Spinach (Bunched)

Supply is good, quality has improved.

### Spinach (Baby)

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

### Spring Mix

The market is stable; Salinas Valley supplies are plentiful. New crop quality is excellent, but leaf size is larger than normal in some lots.

### Green Squash

EAST: Supplies are short and FOB prices are higher for both fancy and medium. GA is primary growing region.

WEST: Nogales product continues to cross as Santa Maria begins in a light way. FOB prices are steady to down this week.

# MARKET TRENDS

JUNE 9, 2017

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Yellow Squash

EAST: Supplies available primarily from GA. SC also continues. FOB prices for fancy are generally steady while prices are stronger for the medium.

WEST: Supplies remain extremely tight this week (almost non-existent) with generally poor quality. FOB prices remain generally steady at last week's high levels.

### Tomatoes

East

#### Rounds

National demand has fallen off dramatically due to the recent high markets and getting past the holiday weekend. Supplies are still down but the lack of demand has caused FOB prices to fall this week on all sizes. The Palmetto/Ruskin (Central) region of FL continues with additional pickings and the fruit from these pickings are on the smaller size. The Quincy, FL region started harvesting this week in a light way with only the Ex-Large size being harvested. The FOB price for 5x6s has fallen around \$2 and the price for the 6x6 and 6x7s have fallen in the \$4 range. Even with the decrease in FOB prices, the trigger price points of most contracts remain exceeded and will be in effect again next week although at correspondingly lower levels. We expect our SC crop to begin to produce toward the end of next week. We look for continued downward pressure on prices. Quality continues to be generally good.

#### Romas

Demand is down and supplies are a little better this week. FOB prices are down approximately \$4. Quality continues to be variable.

#### Grapes

Our SC fields have started to produce this week improving supplies as demand is weak after the holiday weekend. FOB prices are down over \$10 for the 25# bulk and down over \$6 dollars for the 12/1 pt. clamshells. Prices have fallen below trigger price points for contracts.

#### Cherries

Supplies remain tight but demand is down. FOB prices are down slightly from last week.

West/Mexico

#### Rounds

The FOB prices for mature greens in the west continue to mirror those in the east. Demand is extremely weak. Extreme heat in the growing region is causing quality to be only mostly fair with softness being the main issue. Shelf-life normally becomes suspect with these growing conditions. More volume of the larger sized vine-ripes is crossing at Baja. Demand is weak for these tomatoes also.

#### Romas

Baja crossings continue to get ramped up. Prices for all sizes are trending back toward the minimums. The quality of fruit crossing at Baja is generally good.

#### Grapes

Supplies continue to be tight at Baja but can meet most of the demand from the west. Prices remain generally steady from last week.

#### Cherries

Supplies are a little more plentiful this week and demand is light. FOB prices are down by around \$4 compared to last week. More re-packers will be able to meet their needs without having to go east next week.

#### Tree Fruit

Apricots, nectarines, and peaches are on the market in California. Plums will be available by next week. The market is high; expect tight stocks until the season fully ramps up. Nectarine sugar levels range from 10 to 11 Brix; peach levels vary from 9 to 10.

#### Watermelon

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

