



MARKET TRENDS

FOR WEEK ENDING JULY 21, 2017



MARKET TRENDS

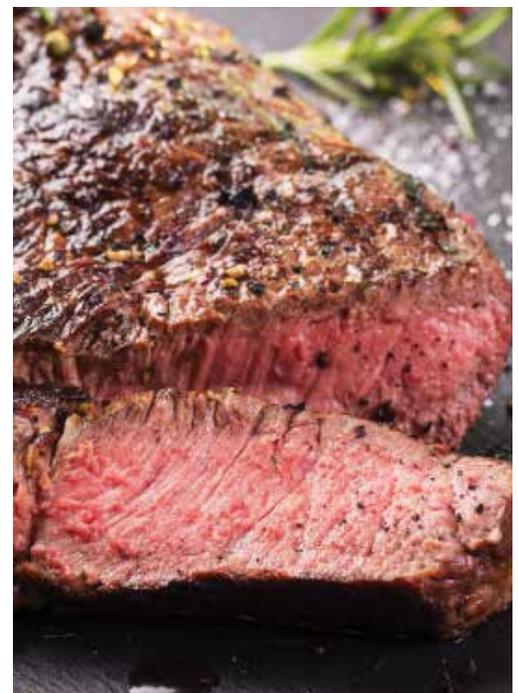
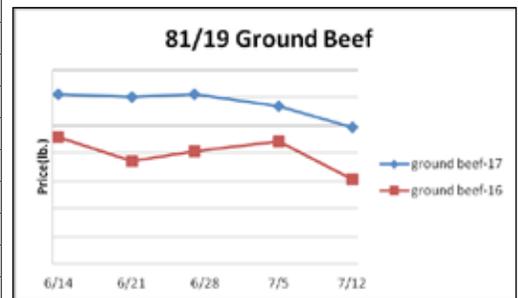
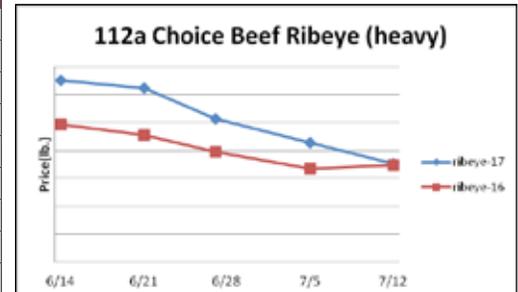
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Beef, Veal & Lamb

Beef output last week was shortened due to the holiday, declining 14.2% from the prior week but was up 3.6% versus the same week last year. Fairly large cattle slaughter is anticipated during the next few weeks which could weigh on the markets. However, forward sales are starting to escalate, reaching an 11-week high last week, which suggests price support could develop thereafter. Forward ground beef and chuck sale prices are holding up well, similar to the current spot markets signaling the downside price risk in those items may be nominal. Beef output is forecasted by the USDA to remain well above 2016 levels for the time being but some supply gaps could occur this fall.

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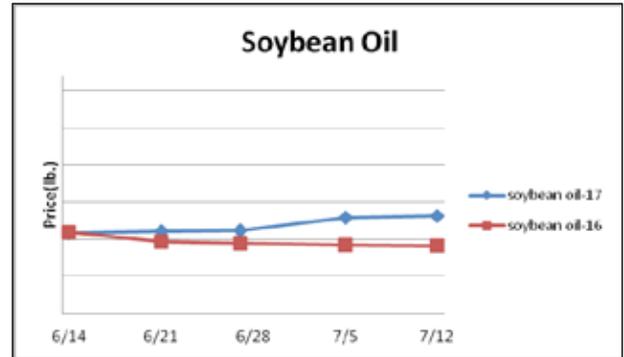
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Grains

Dry conditions continue to cause challenges for the U.S. spring wheat crop. As of July 9th, just 35% of the spring wheat crop was rated in either good or excellent condition, the lowest for the date since 1988. High protein spring wheat supplies could be especially limited during the next year which may cause prices to rise.

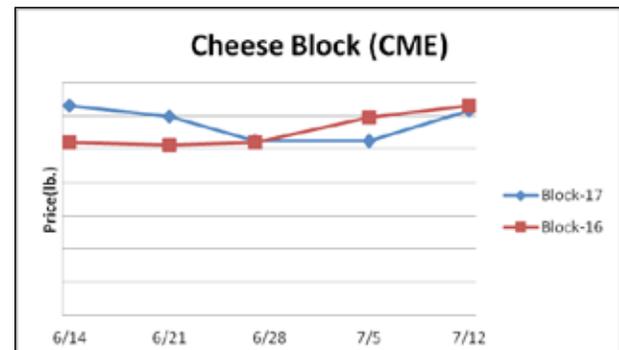
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Higher
Soybean Meal, ton	Increasing	Good	Lower
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher
Distillers Grain, Dry	Increasing	Good	Lower
Crude Palm Oil, lb BMD	Increasing	Good	Higher
HRW Wheat, bushel	Decreasing	Good	Higher
DNS Wheat 14%, bushel	Decreasing	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 butter market remains inflated as disappointing domestic output has tightened supplies. During May, U.S. butter production was 1.8% less than the previous year. Despite being a net importer during the month, U.S. supplies were 2.1% less than 2016 due to the slowed output and lower carry-in stocks. Class IV milk is starting to price above Class III which could aid butter production in the coming months. But butter may remain firm in the near-term due to strong export demand. May U.S. cheese output was 4% less than the prior year. Firmer cheese prices are expected soon.

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



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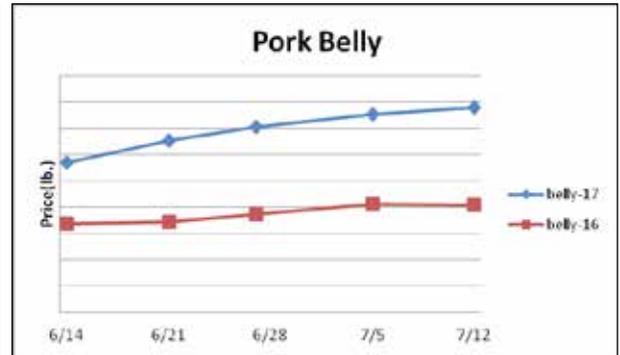
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Pork

Pork production last week declined 15.8% from the prior week due to the holiday, but was .7% above the same week last year. Hog supplies remain seasonally limited but should improve in the not-so-distant future. Pork production during Q3 of this year is forecasted by the USDA to expand by the largest amount compared to the prior quarter since 2009. This could be accompanied with some rather sharp declines in several of the pork markets, including bellies. However, tight stocks could prop belly prices above 2016 this fall.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Increasing	Ample	Higher
Sow	Increasing	Ample	Higher
Belly (bacon)	Increasing	Good	Higher
Sparerib(4.25 lb & down)	Decreasing	Good	Lower
Ham (20-23 lb)	Increasing	Good	Lower
Ham (23-27 lb)	Increasing	Good	Lower
Loin (bone in)	Increasing	Good	Higher
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	Decreasing	Good	Higher
SS Picnic, smoker trm box	Decreasing	Good	Higher
42% Trimmings	Decreasing	Good	Higher
72% Trimmings	Decreasing	Good	Higher



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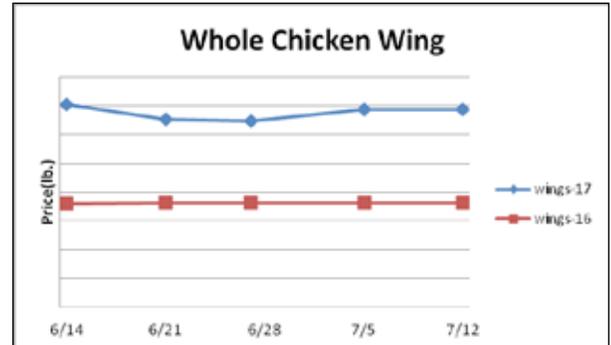
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Poultry

Chicken output for the week ending July 1st rose 4.8% from the prior week and was 4.4% larger than the same week last year. The six-week running total of chicken production stands at 2.5% better than 2016. Still, the chicken markets have remained resilient which is a sign of strong demand. Recent chick placement data suggests that year over year chicken output growth should slow shortly. The six-week moving average for chick placements is tracking just 1.3% above the previous year. This could be especially supportive of the chicken wing markets as the football season nears. The number of table egg laying hens as of June 1st was 1.4% larger than last year but fell from the prior month for the sixth consecutive time. This could support table egg prices later this year when demand seasonally rises.

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



Eggs

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

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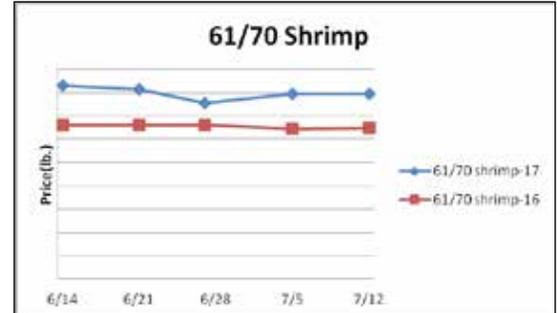
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Seafood

Elevated wholesale prices are encouraging strong U.S. shrimp imports. During May, the U.S. imported 22.9% more shrimp than the previous year marking a record for the month and the biggest for any month so far this year. Solid shrimp imports are anticipated to continue for the foreseeable future which suggests the upside is limited in shrimp prices.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Steady	Good	Lower
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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Paper and Plastic Products

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

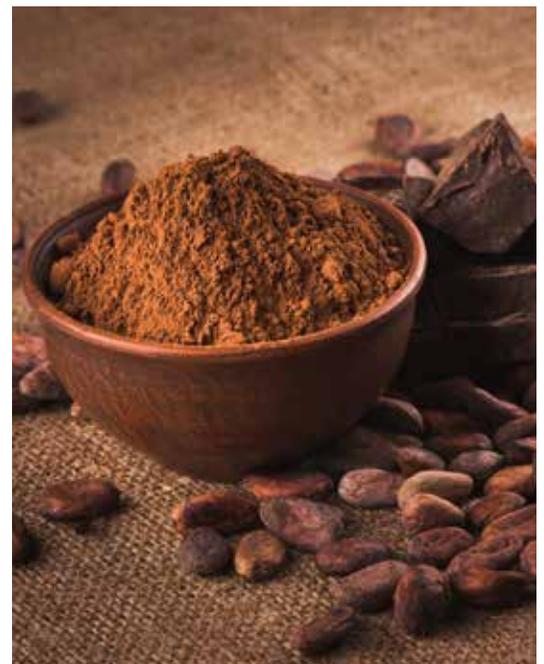
Retail Price Change from Prior Month

Description	May '17	Apr '17	Mar '17
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 most recent West African cocoa harvest has been better than initial expectations which is weighing on cocoa prices. However, nearby cocoa futures have not traded appreciably below the existing price levels in numerous years which suggests a bottom is near.

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



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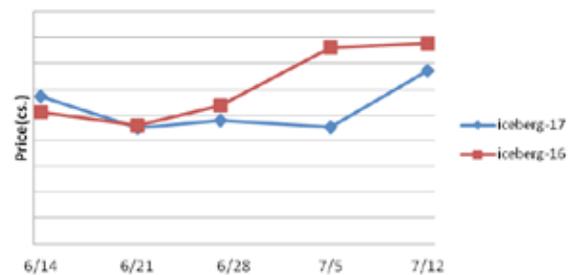
Produce

Avocado supplies remain relatively subpar due in part to weak imports from Mexico and an uninspiring California harvest. Last week avocado shipments from California were 44% less than the same week last year. Still, history suggests that the greater price risk in avocados from here is to the downside during the next few months. The five-year average moves for the 48 ct. Hass avocado market from this week through the end of September is a decline of 19%. The California tomato harvest has improved in recent weeks but remains below 2016 levels. History suggests tomato prices could firm in the coming weeks. Lemons are still in a very EXTREME MARKET and we are seeing a shortage in supply with oranges as well. The melon market is in escalation. Asparagus is also escalated and in short supply. Lettuce is active but stable. Berries are a good buy out of SALINAS. 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

- Apples – EXTREME
- Avocados – ESCALATED
- Asparagus – ESCALATED
- Celery – ESCALATED
- Cucumbers – ESCALATED
- Green Beans – ESCALATED
- Garlic – EXTREME
- Green Peppers – ESCALATED
- Lemons – EXTREME
- Melons – ESCALATED
- Oranges – EXTREME
- Potatoes (Large Sizes) – ESCALATED

Iceberg Lettuce (24 count)



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Produce

Apples

Supplies of Fuji, Gala, and Granny Smith are sufficient; remaining stocks are dominated by 88-count and larger fruit. Quality is very good: sugar levels range from 14 to 18 Brix. California new crop Gala harvesting is expected to begin the first week of August, but may be delayed due to heat. New crop Washington Gala apples will be available in the first week of August also.

Pears

California Sunsprite pears are now available. The start of the California Bartlett season has been delayed until next week due to heat. New crop Washington Bartletts will be available in late August. Sugar levels range from 12 to 14 Brix.

Artichokes

We are seeing prices come down. Quality is good.

Arugula

Supplies are good for baby and wild. Quality is fair.

Asparagus

Expect elevated markets this month. Peruvian stocks remain limited; Mexican volume is low. Quality is very good: stalks are straight and flavor is mildly grassy.

Avocados

Prices remain high in California and Mexico; expect scarce stocks all summer, especially small fruit. Quality is best in California; expect high oil content in California and Mexican supplies.

Bananas

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

Green Beans

EAST: NC & SC are producing light supplies, however, FOBs are down subtly.

WEST: Still fairly light supplies from the west, but improvement is expected in a week. FOB prices are steady.

Berries:

Blackberries

Prices are stable; California stocks are sufficient. Quality is very good: berries are plump, juicy, and sweet, yet tangy. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is easing. Pacific Northwest volume is increasing. The California season is ending; East Coast supplies are limited. Quality is best in Oregon and Washington: berries are plump and sweet, yet tangy.

Raspberries

Prices are slightly higher than last week; the season is past its peak. Quality is average: fruit is juicy and sweet. Sugar levels range from 13 to 14 Brix.

Strawberries

The market is low; Watsonville supplies are plentiful. Overall quality remains good despite the few problems that persistent heat has caused, including bleeding, softness, and shortened shelf-life.

Bok Choy

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

Broccoli

Good green color. Occasional brown bead. Overall quality is good.

Brussels Sprouts

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

Cantaloupe

Market strong, we are going here on the Westside and volumes will start to increase by the weekend and should have some steady volume through mid-October and then transition to the desert. The overall quality is excellent with good sugars and a mostly clean netting and excellent internal color and sugar. This is a great time to promote California melons.



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Produce (continued)

Carrots

There is a good supply with solid quality.

Cauliflower

The market is unchanged; stocks are ample. Quality is very good: curds are creamy white and compact.

Celery

Prices will start easing this week and fall further next week. Increased levels of dryness and pith are being seen throughout the Salinas Valley, tightening supplies. The Michigan harvest has begun.

Cilantro

Quality is getting better but still seeing occasional decay and bacterial spotting.

Corn

Georgia Sweet Corn is plentiful and promotional pricing is available. White, Yellow and Bi-Color corn loading in the Central CA District is now available with good volume.

Cucumbers

EAST: Volume is improving from MI and NJ is producing a dependable crop. FOB prices are beginning to fall as more supplies from MI fill the void. We have seen slight improvement in quality, however, until this is consistent we recommend inventory be kept tight.

WEST: FOB prices are easing up in the west as Baja's supplies improve in both volume and quality for all grades.

English Cucumber

Supplies from Eastern Canada are good.

Eggplant

EAST: There is a variance in price as GA continues to harvest less favorable quality while NC and SC have a strong supply. FOB prices remain relatively stable.

WEST: FOB prices are steady despite Fresno having a slow start. Look for Stockton to begin their harvest in the next two weeks to help fill the pipeline.

Fennel

Supplies for the week will be light.

Garlic

The extremely hot weather the past 7-10 days is helping us significantly. The 2017 crop is dying down. We hope to start bringing in decent amounts of 2017 CA product on tunnels. This crop is now being cracked and peeled for processing. We have been shipping CA product.

Ginger

Chinese ginger supplies have tightened up putting upward pressure on prices across the country. This is still a better dollar value than ginger from Hawaii, Brazil, Thailand and Costa Rica.

Grapes

We are finished in Mexico with some light volume coming out of Coachella, but have started in the San Joaquin Valley and will have good volumes out of here by the weekend. The overall crop here in the central valley looks very good with some excellent color on reds and greens are very nice and clean as well. We are experiencing some extreme heat right now but as of now have not seen much burn damage but we will keep you posted after this weekend. We will have fruit up here through December barring any major weather issues.

Green Cabbage

Green cabbage has improved, supplies are good and quality is good in the east and west. Volume incentives are available out of Georgia, however we have reported some quality issues in eastern cabbage due to the heavy amount of rain.

Red Cabbage

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

Green Onions

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

Honeydew

Market very strong as demand has far exceeded supply for the past few weeks, but we are seeing some increase in volume and should have good supplies by the first of next week from the Westside. The overall quality is also excellent with a nice green to cream exterior and beautiful green internal color. We will be going here on the Westside through Mid-October as well and then transition to the desert.



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Produce (continued)

Jicama

Normal prices and quality is good.

Kale (Green)

Demand is steady and quality is better.

Kiwi

Supplies are good. Prices are good and quality is average.

Lemons

Market strong as demand has been excellent, we are still packing a little of the dist. 2 fruit but will start to really slow down on volume out of this district in the next 2 weeks. We will start in a light way some Mexico fruit next week and then hopefully ramp up our volume by the end of this month. We are also receiving some Chilean and that volume will also start to ramp up next week. The overall quality has been fair to good with some of the dist. 2 fruit showing some weakness and have some clear rot and some brown rot showing up, but we are trying to clean up as best we can also mixing up a few different fungicide mixes to help kill the spores. We are anticipating some good volume out of Mexico that will bridge the gap between the start of our Dist. lemon crop that we should start around the first of September.

Lettuce:

Butter

Prices are down and supply is good.

Iceberg

Some light weights with a possible small gap due to the rains at the time of the current harvest's planting. Occasional internal burn and mildew. Some puffy lettuce. Overall quality is good.

Romaine

Mostly clean with occasional internal burn. Some fields are dealing with mildew. Overall quality is good.

Romaine Hearts

Seeing wind burn and fringe burn issues varying from lot to lot. Good green color. Quality is good.

Green Leaf

Typically smaller sizing than recent at 6 – 8". Occasional field with mildew. Quality is good.

Iceberg Blends

Quality is good. Fields are moving from firm/hard lettuce to puffy and fairly firm lettuce. Which will reduce the chunks. Occasional internal burn.

Chopped Romaine/Romaine Blends

Occasional fringe burn and internal burn. Color ranges from dark green to pale. Good quality overall.

Limes

Rainy weather has reduced stocks; the market is rising. Stylar (break-down near the stem) is an issue, but harvesting crews are sorting for best quality.

Napa

Supplies are normal. Quality is good.

New Mexico Onions

Yields on some of the later plantings are coming up a little shorter than expected. This can be attributed to the most recent well publicized hot weather the west has been burdened with. On top of that demand has really picked up over the last four days as California and Texas start wrapping up their season. We will see significant jumps in the fob price of Super Colossals, Colossals and Jumbo yellow as well as a big increase on both medium and jumbo reds for the upcoming pricing period. Extra supply from this point forward will be extremely limited.

Oranges

Market is very strong and day to day demand exceeds supply on all sizes fancy and choice as navels are all but finished and Valencia is the main variety. The fruit quality is good right now, but we are experiencing some record high temperatures this week and into next week which will probably cause some re-greening and fruit will also soften up a bit. 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 and do not expect to see things ease but we will keep



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Produce (continued)

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 to be very difficult months as far as supply is concerned and we will probably see a gap between Valencia's and navels this year. We do not expect to start California navels until the later part of October. There will be some Chilean navels arriving next week so hopefully that will help a bit on the supply side.

Parsley (Curly, Italian)

We are seeing prices that are still higher but improving. Quality is average.

Green Bell Pepper

EAST: the NC crop continues to produce, however, supplies are fairly light from the region. NJ is expected to get into their fields in about a week and MI is about 10-14 days from harvest. FOB prices remain somewhat flat. Quality looks good despite the periodic showers.

WEST: Supplies are tight coming from the region and FOB prices are on the rise. The yields from Bakersfield are showing signs of quality trouble while Fresno and surrounding growing regions have good quality but do not have enough volume to support the crop transition.

Jalapeño Pepper

EAST: Light supplies are coming from the east as we wait for the new crops to come on board in 10-14 days. Despite limited volume, FOB prices remain fairly stable.

WEST: Very limited supplies are expected for another 2-3 weeks due to light plantings. FOB prices are steady.

Red Bell Pepper

WEST: Relief is in sight. FOB prices are beginning to fall as supplies steadily improve.



Pineapple

Strong demand persists; the market is up and volume is low. Overall quality is very good: fruit is juicy and tangy, yet sweet. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

Although the market is still steady available supply is not. Calls made across the state found that there is an extreme limitation of available supply for sale. Sheds are just managing regular business and in general are not looking for additional sales until new crop. There has been a price gap in the market between 80cts and smaller and 70cts and larger. We feel these smaller potatoes will be moving up very soon as their demand has increase significantly. For the next 4-5 weeks supplies will continue to be problematic with the limited supply left in the state of Idaho.

Radishes

Quality is good and supply is slowing down. Expect to see stronger markets through the summer.

Snow and Sugar Snap Peas

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

Spinach

Dealing with brittle spinach that is causing mechanical damage. Peak branded product will be in and out of brand due to the brittle texture.

Spinach (Baby)

Baby and clipped spinach supplies are good. Quality is fair due to heat related issues and occasional reports of mildew.

Spring Mix

The market is average; volume is high. Extremely high temperatures continue to impact raw product quality, supply levels, and shelf-life. Maintaining the cold chain is vital for optimal shelf-life and quality.

Green Squash

EAST: Following suit of yellow squash, NJ, MI, NC and SC crops have good volume. FOB prices are slightly down for medium and fancy. Large remains stable.

WEST: Quality remains good as supplies are coming in strong. FOB prices slightly down moving into next week.

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Produce *(continued)*

Yellow Squash

EAST: NJ, MI, NC, and SC are each producing fairly sound product. Some quality issues present themselves in older fields. FOB prices are generally stable.

WEST: The harvest from the west is showing good yield and quality. Prices have slight downward pressure going into next week.

Tomatoes

EAST:

Rounds

TN, NC, and VA are just getting started with their seasonal production. FOB prices for medium size remains stable while large and extra-large sizes are up slightly due to a shortage in supply. Quality overall remains sound, however, the east is still experiencing sporadic rain showers. Therefore, a close eye is being kept on shelf life.

Romas

FOB prices are down substantially with good supplies harvesting in the east.

Grapes

NC and VA are beginning to produce good supplies while SC winds down their season. Prices remain steady. Quality is generally good despite the recent rains.

Cherries

Both supply and demand are steady while FOB prices are down. Quality is consistent from the region.

WEST/MEXICO:

Rounds

As previously reported, extreme temperatures are taking a toll on the CA crop (see weather forecast at end of report). Growers have seen 5+ days straight of temperatures over 100 degrees, which results in shorter days for picking. We are also seeing a large variance in quality, resulting in a wide range of FOB prices. Extra-large size fruit is in short supply while medium size fruit is more readily available at this time. It is recommended to keep inventories tight as product is showing tenderness.

Romas

The western roma market has become a little slippery as we move forward in production. Although prices are showing slight downward pressure, quality issues are very apparent due to the extreme heat to the point that one Baja grower suffered a complete crop failure. The wide range in FOB prices corresponds with the wide range in quality.

Grapes

FOB prices and availability are steady from the Baja region, yet quality continues to be monitored closely due to heat.

Cherries

A slight decrease in pricing is reflective of the good supplies produced in the West.

Tree Fruit

The market is stable; apricot, nectarine, peach, and plum stocks are adequate. 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.

Watermelon

The market has stabilized; last week's strong demand is easing. Volume is high. Quality is excellent: color is deep red, texture is firm, and flavor is sweet, yet refreshing. Sugar levels average 11 Brix.

