



MARKET TRENDS

FOR WEEK ENDING JULY 7, 2017

 **PERFORMANCE**
FOODSERVICE



MARKET TRENDS

JULY 7, 2017

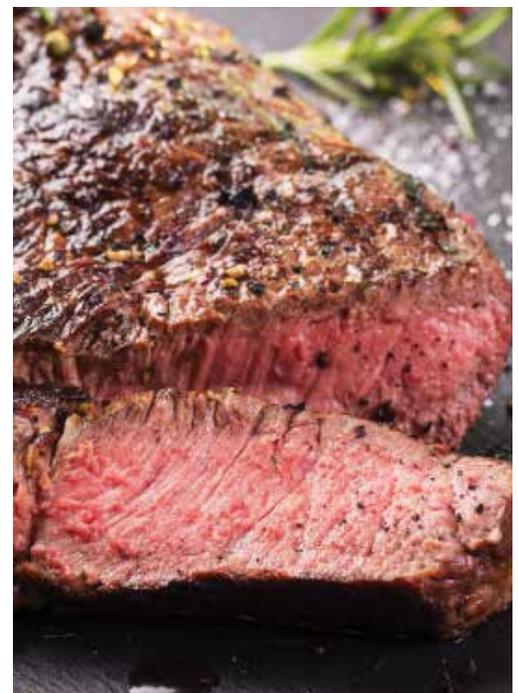
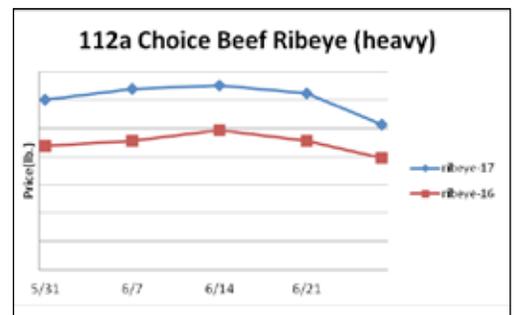
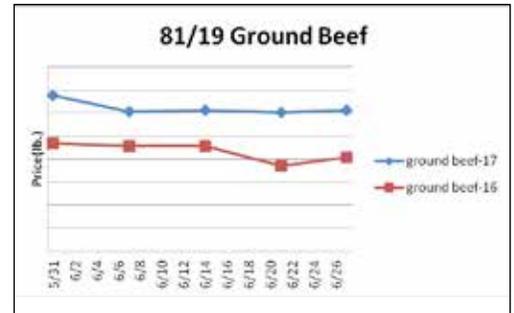
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Beef, Veal & Lamb

Beef output last week rose .9% and was 1.4% larger than the same week last year. The June 1st cattle on feed inventory was 2.7% larger than 2016 with May placements into feedlots up 12.2% and the biggest for the month in a decade. Slaughter ready cattle supplies should be adequate this summer. Beef shipments have slowed with weekly spot sales the smallest in five weeks. Forward beef shipments have been light as well at continued discounted prices. Last week, the choice 0x1 strip market was pricing at a 10% discount for delivery 22 to 90 days out compared to immediate delivery. Other markets were pricing forward lower as well including ground chuck and ribeyes.

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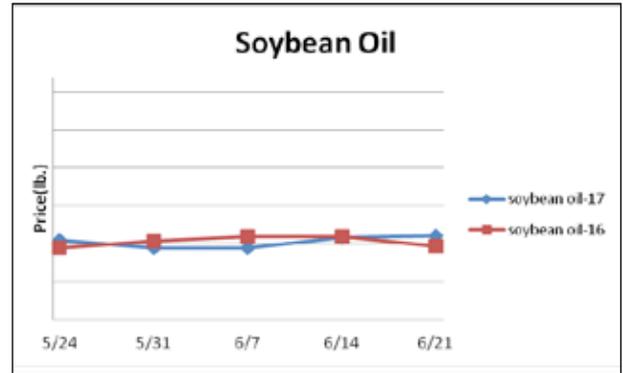
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Grains

The domestic winter wheat harvest is progressing with 31% in the bin as of June 25th which is in line with historical averages. However, yield and protein reports with wheat have been inconsistent. The downside price risk in winter wheat during the next few months may only be modest.

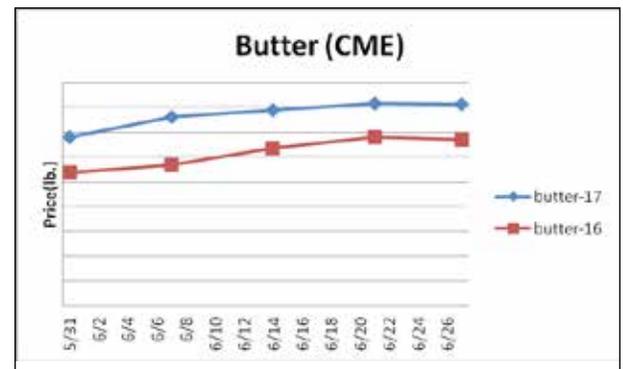
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Higher
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Lower
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Lower
Distillers Grain, Dry	Decreasing	Good	Lower
Crude Palm Oil, lb BMD	Steady	Good	Same
HRW Wheat, bushel	Decreasing	Good	Higher
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 butter market remains elevated despite historically large stocks. As of May 31st, U.S. butter holdings were 3.5% less than the previous year but the third biggest for the month since 1993. That said, the net butter inventory build during May was the smallest in four years. Solid export demand and seasonally declining output could be supportive of butter prices this summer. May 31st cheese supplies were 7% more than 2016 and a record for any month. But the May build in stocks was the smallest in a decade. Cheese prices could move upward in the coming weeks.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	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	Lower
Butter (CME)	Decreasing	Good	Higher
Nonfat Dry Milk	Decreasing	Ample	Higher
Whey, Dry	Decreasing	Good	Higher
Class 1 Base	Increasing	Good	Higher
Class II Cream, heavy	Decreasing	Good	Higher
Class III Milk (CME)	Decreasing	Good	Higher
Class IV Milk (CME)	Decreasing	Good	Higher



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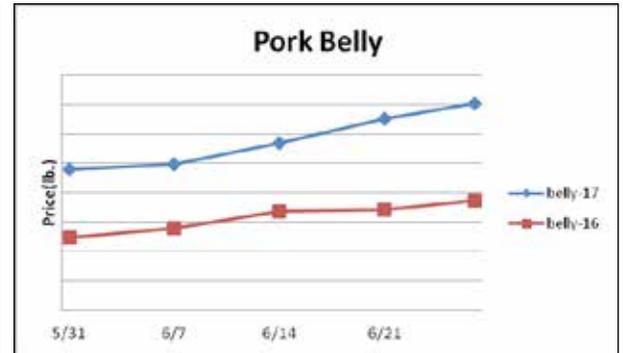
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Pork

Pork production declined 1.8% last week but was 2.8% larger than the same week a year ago. Pork output should seasonally bottom in the coming weeks and then turn upward. This suggests that the upside price risk in most of the pork markets may only be modest. May 31st U.S. pork stocks were 4% less than last year with picnics (22%), bellies (59%) and trim (7%) holdings lower. Belly supplies were a record low for the month once again as disappearance during the month was up 10% versus 2016. Higher belly prices could occur.

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)	Increasing	Good	Higher
Ham (20-23 lb)	Decreasing	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)	Increasing	Good	Higher
Picnic, untrmd	Increasing	Good	Higher
SS Picnic, smoker trm box	Increasing	Good	Higher
42% Trimmings	Decreasing	Good	Higher
72% Trimmings	Decreasing	Good	Higher



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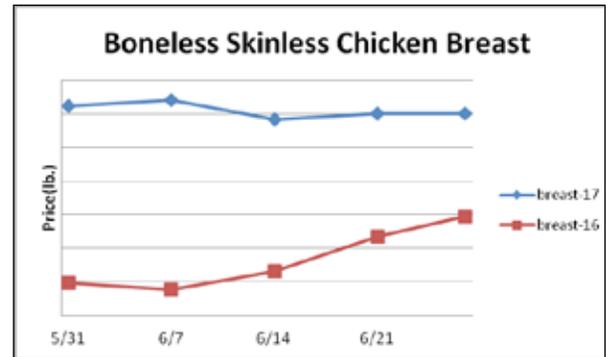
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Poultry

For the week ending June 17th, chicken output declined .2% from the previous week but was 2.3% larger than the same week last year. The six-week total for chicken production is trading 2.8% above 2016. However, tamer year over year gains in chicken output may be forthcoming. The May broiler type chick hatch was just 2% bigger than last year. If lethargic year over year chicken production gains continue, it could be especially supportive of chicken wing prices during the late summer and fall. Chicken producers may be attempting to expand output at greater levels longer term. The number of broiler layers as of June 1st was 2.2% more than the prior year and the largest since the spring of 2010.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Steady	Good	Higher
Wings (jumbo cut)	Decreasing	Good	Higher
Wing Index (ARA)	Decreasing	Good	Higher
Breast, Bnless Skinless NE	Decreasing	Good	Higher
Breast, Bnless Skinless SE	Increasing	Good	Higher
Breast Boneless Index (ARA)	Increasing	Good	Higher
Tenderloin Index (ARA)	Increasing	Good	Higher
Legs (whole)	Decreasing	Good	Higher
Leg Quarter Index (ARA)	Increasing	Good	Higher
Thighs, Bone In	Steady	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	Lower
Medium Eggs (dozen)	Increasing	Short	Higher
Liquid Whole Eggs	Steady	Short	Lower
Liquid Egg Whites	Increasing	Short	Lower
Liquid Egg Yolks	Steady	Short	Higher
Egg Breaker Stock Central	Increasing	Short	n/c

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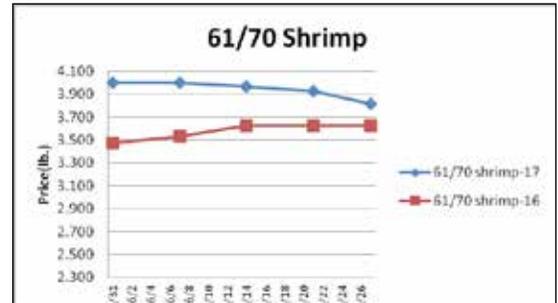
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Seafood

The Newfoundland snow crab fishing season continues with 72% of the historically low quota landed. The 2017 Newfoundland snow crab quota at 35,419 metric tons is 22% less than last year and the smallest in recent history. Snow crab demand has been challenged by the inflated market levels but the downside for prices may be modest in the near term.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Increasing	Good	Higher
Shrimp (61/70 frz)	Decreasing	Good	Higher
Shrimp Tiger (26/30 frz)	Decreasing	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	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

Coffee prices have softened during the last few weeks as the Brazilian harvest progresses. Those with forward upside price risk have been actively contracting coffee as of late which signals that the downside price risk in coffee from here may be nominal.

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	Increasing	Good	Lower
Sugar lb ICE	Steady	Ample	Lower
Cocoa mt ICE	Decreasing	Short	Lower
Orange Juice lb ICE	Increasing	Good	Lower
Honey (clover) lb	Increasing	Good	Lower



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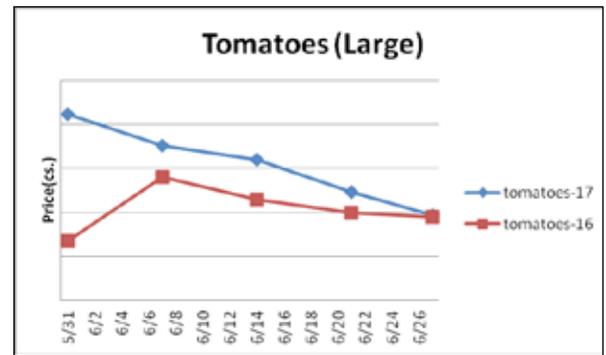


Produce

Tomato supplies are improving as the chief harvest areas transition north. Total tomato shipments last week rose 2.5% from the previous week but was still 13% less than the same week a year ago. History suggests that tomato prices could move even lower in the near term. The five-year average move for the mature green large tomato market during the next two weeks is a decline of 17%. History also suggests that tomato prices could rebound thereafter. Avocado imports from Mexico were strong last week. However, it's possible that Mexican supplies could become thin again this summer. Celery, and 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 an Act of God. Garlic will be pulling from the US in another week or two. Lettuce is stable. 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
- Celery – ESCALATED
- Cucumbers (Select) – ESCALATED
- Garlic – EXTREME
- Green Beans – EXTREME
- Green Peppers – ESCALATED
- Lemons – EXTREME
- Melons – ACT OF GOD
- Oranges – EXTREME
- Tomatoes (roma) – ESCALATED



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Produce

Apples

Extreme: Demand from retail is extreme causing shortages industry wide. Golds and Grannys remain extremely short causing a shift in demand to all other varieties. We expect to see this continue through the rest of the season. Offshore deals are also very active due to the shortages in the Pacific Northwest.

Pears

Bosc and Anjou are readily available domestically out of Washington. We expect to see California begin in July. Offshore Bosc and Packham supplies are steady.

Artichokes

We are seeing prices come down. Quality is good.

Arugula

Supplies of both baby and wild arugula are light and quality is fair.

Asparagus

The market is improving, however small, standards and larges are slightly higher in price than normal. Expect this market to tighten back up in the next few weeks.

Avocados

ESCALATED - On the immediate horizon, we expect to see a dip in production after the fourth and could see markets turn again. Long term market forecasts call for lighter volume crossing through Laredo, TX. Volume is anticipated to be 30 million pounds next week, down 10 million pounds from the current week. This is a result of the transition to the For Loca Crop. California volume will also begin to dip while Peru is increasing. We anticipate a very inconsistent avocado market over the next several weeks.

Bananas

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

Green Beans

EAST: Supply in the east is still extremely short. FOB prices have jumped up significantly again. GA, TN and eastern NC continue to battle the rainfall.

WEST: Supplies are still snug, but FOBs have fallen a small amount. Eastern Washington is looking to start harvesting next week.

Berries:

Blueberries

Production is increasing in Baja California and Oxnard; prices have come down. Prices are varied throughout the region, quality is good.

Blackberries

Blackberries are good in supply through this month. Quality is good.

Raspberries

Good quality and supply. Central California growers are now harvesting as well.

Strawberries

Availability has tightened and prices are a bit higher. Quality is average to good.

Bok Choy

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

Broccoli

Good green color. Some loose bead and slightly branchy. Overall quality is good.

Brussels Sprouts

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

Cantaloupe

Market extremely tight with demand exceeding supply as the California and Arizona deserts are experiencing the record heat which has cut production in half, therefore very limited supplies. The excessive heat is very hard on the melons and vines, the people in the field as well can only work for a few short hours before calling it a day. Our Weather has eased here in the central valley and now in the normal range of upper 90's which is ideal for melons, we will get started on the Westside this weekend and volume will increase towards the end of next week. We expect to have good supplies of Westside melons through the middle of October.



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Produce *(continued)*

Carrots

There is a good supply with solid quality.

Cauliflower

Market is good, quality is good and prices are down.

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 is now available with good volume available.

Cucumbers

EAST: GA has completed their summer crop. NC is coming up with short supplies as well as subject quality shown mostly in the form of short shelf life due to heavy rains. The east is looking to NJ and MI to fill the supply chain.

WEST: Demand for Baja supplies remains light; however, FOB prices are slightly up due to a lower yield.

English Cucumber

Supplies from Eastern Canada are good.

Eggplant

EAST: GA eggplant is abundant therefore FOB prices are descending.

WEST: While the desert crop is complete, Fresno starts just in time. FOB prices are up a few dollars. Stockton is about two weeks out from beginning their summer harvest.

Fennel

Supplies for the week will be light.

Garlic

EXTREME 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 to prepare for the cracking/peeling process sometime late next week. At this time, we think we will begin shipping 2017 California peeled in about two weeks.

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

Market is steady on reds and greens with good volumes out of Mexico and Coachella valley, but we are starting to slow down on harvesting and will probably see some burn due to the record high heat we are experiencing especially in the California desert, where we are seeing temperatures in the 120 degree range which is hard on the fruit as well as the people, and the forecast is for it to last through the weekend. We will continue out of both of these regions through the month and will hopefully carry into the second week of July as we will probably have a later start here in the San Joaquin Valley compared to last year. We are anticipating our start date to be around July 10th here in the San Joaquin Valley and will carry us through December on fruit. The overall quality of the fruit is good right now, but we will keep you posted on how the fruit comes through these extremely hot days ahead.

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 demand exceeds supply on all sizes out of Mexico, and the California/ Arizona deserts. Also as previously mentioned the excessive heat is going cause some damage but most of all we will be harvesting very few over the next 10 days and will have to see how everything



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Produce (continued)

comes through this blast of heat. The overall quality of the fruit has been very nice with some excellent sugars and nice firm interior condition and good color. We are expecting to get started here on the Westside this weekend and start with better volume by the end of next week. The desert will finish within 10 days.

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 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 into summer (tomorrow first day of 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. We will start to harvest some Mexican lemons next week which is early but we are excited to get started and hopefully help ease some of the pressure. We will keep you posted on our progress out of Mexico.



Lettuce:

Butter

Prices are down and supply is good.

Green Leaf

A lot of green leaf fields are showing fringe burn and internal burn. Dehydration is also an issue. Quality is fair to good.

Iceberg

Quality is getting better but seeing rib blight and some weak tip. Overall quality is fair.

Romaine

The warm weather is causing fringe burn and dehydration. Wind burn is also an issue. Overall quality is fair.

Romaine Hearts

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

Iceberg Blends

Iceberg at the processing level is still firm to hard causing issues with chunks. Still seeing 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. Most romaine blends are pale in color to remove defects from the green outer leaves.

Limes

Limes are available. Great quality and color.

Napa

Supplies are normal. Quality is good.

New Mexico Onions

After weeks of weak pricing and ample supply we are seeing this market making a move. It has been previously reported that we would be seeing market activity by the end of June and that is now coming to fruition. High temperatures are resulting in smaller onions and lesser yields. Super colossal, colossal and jumbo yellow are currently on the move along with both sizes of whites and reds. The expectation is that the New Mexico onion market will be more bullish from this point moving forward. Early reports indicate we will have new crop onions in Idaho by the third week of August, will keep you posted on any changes as more information is comes in.

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Produce (continued)

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 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: NC crop continues their seasonal harvest. Quality is reasonably good coming from this area. FOB prices are somewhat down on large and choice while jumbo and extra-large remain steady. GA continues to harvest product that has gone through a lot of rain. This product is bringing lower FOB prices, but quality is generally unacceptable. WEST: FOB prices are steady as Bakersfield continues to harvest. Quality remains good from this area. Fresno is looking to start harvesting in about 10-14 days.



Jalapeño Pepper

EAST: FOB prices remain relatively unchanged. GA crop is still going strong. WEST: Nogales crop has finished. Santa Maria and Baja have begun but plantings are lighter than previous years. FOB prices are slightly up.

Red Bell Pepper

WEST: The west is still experiencing a supply gap. As a result, FOB prices have risen once again. This gap is anticipated to carry on yet another week.

Yellow Pepper

Extremely Light supply crossing through Otay. Coachella is out and could be done due to the heat wave.

Pineapple

Supplies are good, loading at the ports as well as forward distribution centers. Fruit is cutting nicely with good brix. This is a good substitute for Cantaloupe and Honeydew.

Idaho Potatoes

The potato market will mostly like remain stable this week. There are a few more large russets available this week but that may have everything to do with receivers building inventory as they have prepared for the short work week of July 4th. We need to watch markets closely as next week is only a three day production week for the Idaho sheds and that could cause markets to move if demand is heavy.

Radishes

Quality is good and supply is slowing down.

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

There is plenty of product with good quality.

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Produce (continued)

Green Squash

EAST: Prices are fairly steady as the crop carries on from NJ, SC, and NC. Quality is somewhat improving, however the crop has gone through a great deal of rain. Therefore, we recommend to continue keeping inventories tight.

WEST: Various regions continue in full production. Quality continues to be good and FOB prices are down subtly.

Yellow Squash

EAST: Lower FOB prices are reflecting the strong supplies coming from NJ, SC, and NC areas.

WEST: Harvests are producing solid supplies and quality. FOB prices are down once again.

Tomatoes

EAST:

Rounds

Florida and Georgia crops have completely ended due to rainfall. Our South Carolina coastal crop continues to harvest a healthy supply. As we move along the east coast harvest, Tennessee, North Carolina, and western South Carolina are looking to start harvesting in about two weeks. Quality remains good coming from the east; however, shelf life remains uncertain due to the rain. The good supplies coming from SC has resulted in FOB prices decreasing.

Romas

Once again, romas are the only tomato commodity that is experiencing a tight market. Tennessee is expecting to start their harvest within the next week. Extra-large and large size prices remain unchanged while mediums are up.

Grapes

Supplies continue to be bountiful coming from our South Carolina farms. Quality is good and FOB prices are slightly up.

Cherries

Demand remains weak. FOB prices are down for next week due to the lack of demand. Quality is still proving to be good.

WEST/MEXICO:

Rounds

California is moving full steam ahead with their harvest and the lower FOB prices are reflective of the ample supplies. Extra-large rounds are down while large and medium sizes have fallen as well. As reported last week, a massive heat wave moved through the western region. Temperatures reached over 100 degrees for over a week and weather reports are still calling for more heat moving into next week. This heat wave is showing its strength as a direct result of the quality of the fruit. Tenderness is very apparent. Inventories are recommended to be kept as tight as possible.

Romas

FOB prices from Baja remain steady from last week. Prices at McAllen crossing are little stronger this week. We expect better supplies in the next week or two which should start to put downward pressure on FOBs.

Grapes

Although supplies are plentiful from the Baja region, some quality concerns are becoming apparent. We are seeing a wider than normal range in FOB prices which corresponds to the wide range we are seeing in quality. FOB prices are up as demand moves to higher priced grapes for more reliable quality.

Cherries

Prices remain unchanged as supply and demand remain in equilibrium. There continues to be a limited amount of growers in the region.

Stone Tree Fruit:

Cherries

Hit and miss supply out of California while Washington begins to ramp up.

Nectarines

Yellow and White available Yellow Peaking 50s-80's, Whites Peaking 50's, 60's and 70's

Peaches

Yellow and White available- Yellow Peaking 50s, Whites Peaking 60's and 70's

Plums

40's, 50's, 60s and 70's available.

Apricots

Hit and miss out of California.

Watermelon

Good supplies are now available out of Texas, the Carolinas and Georgia. California supplies will remain light through the middle of next week. Fruit is cutting beautifully, deep red and sweet! A good substitute for cantaloupe and honeydew over the next 7 to 10 days.

