



# MARKET TRENDS

FOR WEEK ENDING AUGUST 18, 2017



# MARKET TRENDS

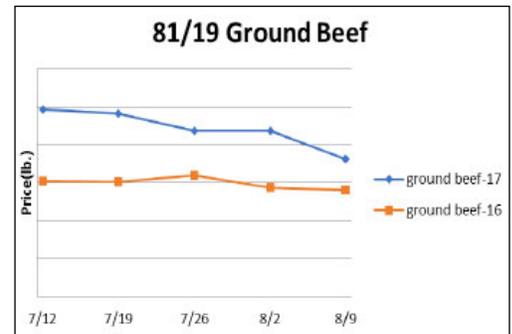
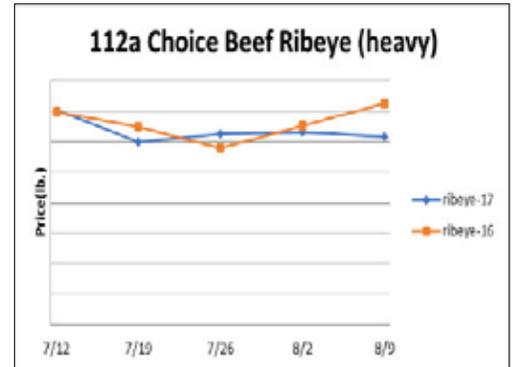
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## Beef, Veal & Lamb

Beef production last week rose 1.4% and was 6.8% larger than the same week last year. Cattle slaughter was the fourth biggest since the fall of 2013. Near slaughter ready cattle supplies are expected to remain adequate to ample during the next few weeks which should fuel solid output. However, there are concerns that the near slaughter ready cattle supply could tighten later this fall. The July 1st cattle on feed inventory was 4.4% bigger than 2016 with placements into feedlots during June up 16.1% year-on-year. The total July 1st cattle herd was the biggest for the date since 2008 but a smaller beef replacement heifer herd suggests herd growth is slowing. Beef prices may find support soon.

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



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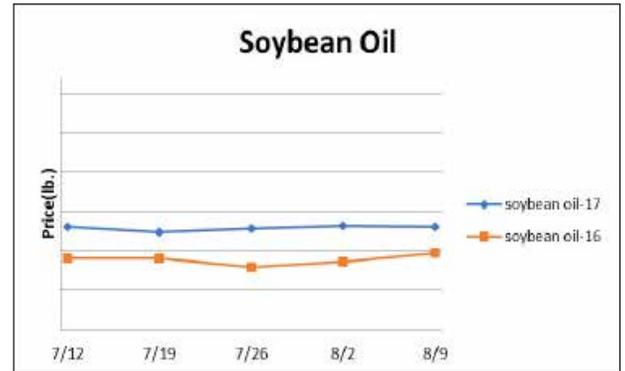
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## Grains

The U.S. spring wheat harvest is underway with 24% in the bin as of August 6th. Typically, a building spring wheat harvest puts downward pressure on spring wheat prices. However, poor crop conditions could limit the downside, especially for durum.

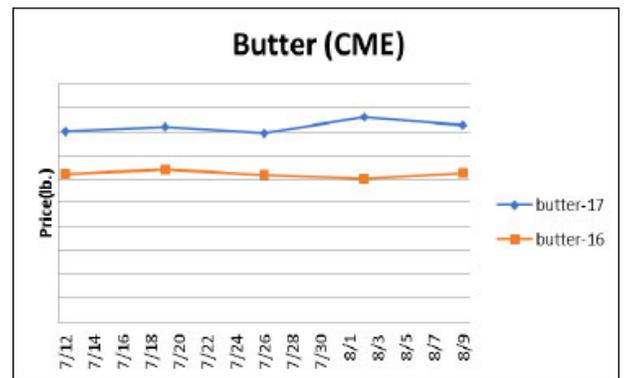
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Higher
Soybean Meal, ton	Increasing	Good	Lower
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher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



## Dairy

Milk output expansion continues in the U.S. with production during June up 1.6% compared to 2016. Milk per cow yields during the month rose .7% from the prior year, while the size of the herd was bigger by .9% and the largest in two decades. Milk farmers added a net 4,000 head to the herd during the month. Milk output in California during June was down 2.1% year-on-year, while Wisconsin was up just .2%. June butter production fell 4.8% from last year, while cheese output was higher by 3.2%. The cheese and butter markets usually remain firm in the near term.

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



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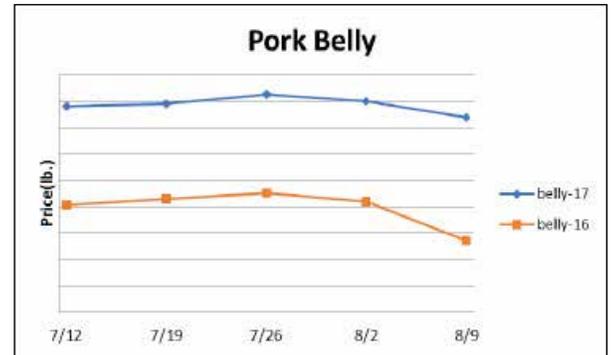
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## Pork

Pork output last week rose .5% and was 2.1% larger than the same week last year. Hog slaughter reached a six-week high. Tight inventories have tempered the seasonal downside in the belly markets. June 30th pork belly holdings were down 65% from the prior year and a record low for the month. Still, history indicates that the greater price risk in bellies from here is lower. June 30th total pork (4%), picnic (3%), and trim (5%) stocks were also below 2016 while ham (8%), loin (5%), ribs (1%), and butts (14%) inventories were bigger. Lower pork prices usually occur during the fall.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Decreasing	Ample	Higher
Sow	Increasing	Ample	Higher
Belly (bacon)	Decreasing	Good	Higher
Sparerib(4.25 lb & down)	Increasing	Good	Higher
Ham (20-23 lb)	Decreasing	Good	Higher
Ham (23-27 lb)	Decreasing	Good	Higher
Loin (bone in)	Decreasing	Good	Higher
Babyback Rib (1.75 lb & up)	Decreasing	Good	Higher
Tenderloin (1.25 lb)	Increasing	Good	Higher
Boston Butt, untrmd (4-8 lb)	Increasing	Good	Lower
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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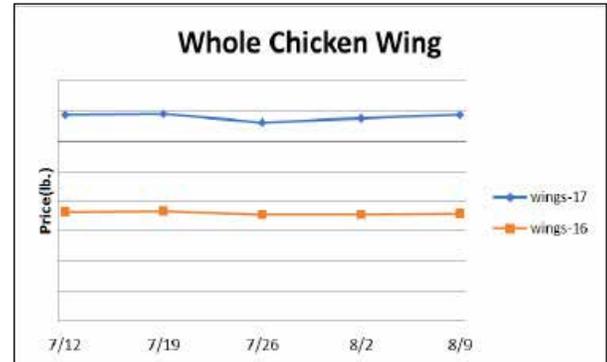
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## Poultry

For the week ending July 29th, chicken production rose 1.1% from the prior week and was 1.4% larger than the same week in 2016. The six-week moving average for chicken output is tracking just 1.5% above the previous year. The June broiler type chick hatch was 2% better than last year which, if accompanied with heavier bird weights, could signal a boost in year-over-year chicken output gains in the coming weeks. Longer term, chicken producers appear to be in expansion mode with the July 1st broiler laying flock up 3.3% compared to a year ago and the largest since the spring of 2010. The chicken wing markets are firm and history suggests they could remain so during the next few weeks. Chicken breast prices may find support shortly.

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



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

## Eggs

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



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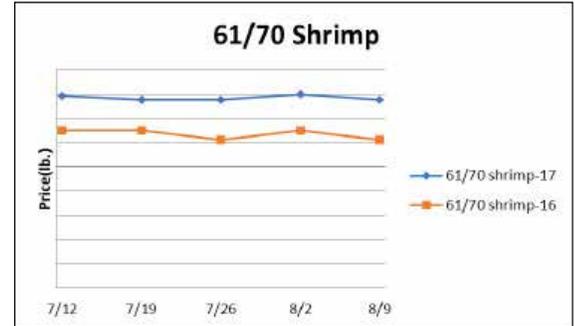
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## Seafood

Elevated price levels helped boost snow crab supplies during June as U.S. imports were 13.3% better than the previous year. However, year to date snow crab imports are still 11.7% less than 2016. The smaller Alaskan and Newfoundland snow crab fishing quotas are expected to be supportive of the snow crab markets during the next several months.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Decreasing	Good	Lower
Shrimp (61/70 frz)	Decreasing	Good	Higher
Shrimp Tiger (26/30 frz)	Steady	Good	Higher
Snow Crab, frz	Increasing	Good	n/a
Tilapia Filet, frz	Increasing	Good	n/a
Cod Filet, frz	Increasing	Good	n/a
Tuna Yellowfin, frsh	Increasing	Good	n/a
Salmon Atlantic Filet, frsh	Decreasing	Good	n/a
Pollock Filet, Alaska, frz	Decreasing	Good	n/a



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

## Various Markets

The California tomato for processing harvest is progressing, but slowly. Total tonnage through the last week of July was just over 1.8 million tons, the smallest total for the date in the last 15 years. A smaller harvest this year is expected to support canned tomato prices this fall.

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



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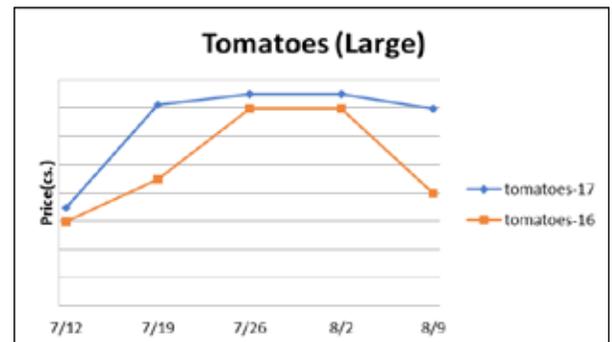


## Produce

The tomato harvest from California has been less than ideal as of late which has brought support to prices. For the last week of July, tomato shipments out of Central California were 17.6% less than the previous year. The tomato markets could remain erratic during the next several weeks as the northern "home-crops" provide more of the supply. The Idaho potato markets remain elevated, at prices not seen since the summer of 2011. Idaho potato supplies could remain seasonally limited in the near term which should be supportive of the markets. Thereafter, the risk in potato prices is to the downside. Lemons are still in a very extreme market and we are seeing a shortage in supply and an extreme market with oranges as well. Asparagus is also escalated on larger sizes. Avocados are in a very extreme market with some growers under an Act of God. Lettuce is active but stable. However, we may start seeing some quality issues in tender leaf products. 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.

## MARKET ALERT

- Apples – EXTREME
- Avocados – ACT OF GOD DECLARED
- Asparagus (Jumbo) – EXTREME
- Cilantro – ESCALATED
- Garlic – EXTREME
- Lemons – EXTREME
- Oranges – EXTREME
- Potatoes – ESCALATED
- Roma Tomatoes (East) – ESCALATED
- Roma Tomatoes (West) – ELEVATED



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## Produce

### Apples & Pears

New crop California Galas are available. Granny Smith and Red Delicious Apples from Washington remain on the market. Fuji, Gala, and Golden Delicious Apples are nearly depleted. Quality is very good: sugar levels range from 14 to 18 Brix. New crop Washington Gala apples will be available in late August. Packer label California Bartletts are on the market. Quality is very good. 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. Prices are rising.

### Asparagus

EXTREME (Jumbos only) - The market is tight on jumbos; we are in short supply and seeing shortage by about 50%. This is due to the heat in Mexico. We usually pull from Mexico this time of the year but are having to pull from Peru due to quality. Peru lacks the supply, so we are seeing supply issues and high prices on jumbos; all others are steady.

### Avocados:

Act of God Declared..Due to domestic production finishing up as well as offshore production winding down in alignment with a slowly maturing Flor Loca crop, our contract volume and pricing is no longer sustainable and will be based on the market through the month of September at the earliest. Long term market forecasts call for critically short supplies and no guarantees of availability crossing through the border day to day.

### Bananas

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

### Green Beans

Supplies are good out of Michigan and Tennessee this week. Quality has also improved, seeing less rust and mildew issues. Lighter than expected supplies will continue in the west as heat is causing some quality issues and supply issues. FOB prices are mostly unchanged.

### Berries:

#### Blueberries

Production is increasing in Baja California and Oxnard; prices will remain unchanged this week while prices are varied by 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 is good, although quality in the Santa Maria is not that favorable. Quality is good out of Salinas but prices are getting higher.

### Bok Choy

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

### Broccoli

Prices are slightly higher and supplies are on the lighter side. Quality is good.

### Brussels Sprouts

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

### Cantaloupe

Market is finally starting to ease a bit and are going in a good way here on the Westside, demand is excellent and fruit is moving out on a daily basis so not much holdover from day to day. The overall quality is very nice fruit is firm and clean with a nice clean net, and overall just a very nice opening box. The extreme heat is causing a little sugar drop but fruit is still eating excellent we are peaking on 9's and 12's but getting a few smaller. We will have good volume going forward here through mid-October; this is an excellent time to promote melons.



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## Produce *(continued)*

### Carrots

Due to the heat, we are seeing some quality issues with cellos in Bakersfield.

### Cauliflower

Market is good; supplies are lighter and quality is very good. Prices are steady.

### Celery

Oxnard is done and we are now in Salinas for 100% of supply. Prices are stable and quality is good.

### Cilantro

Quality is getting better but still seeing occasional decay.

### Corn

Georgia Sweet Corn is for the most part finished, seeing more production now available out of Michigan. White, Yellow and Bi-Color corn loading in the Central CA District is now available with good volume.

### Cucumbers

North Carolina production has increased and better quality is being reported from the fields. We are also seeing more availability. Michigan production has backed off slightly as cooler weather has hit the region. Supplies are taking a turn down out of Baja and Central Mexico. We do need to keep an eye on Michigan as quality will be a struggle due to recent heavy precipitation. It seems the market is ticking upward due to the lighter supply out of Mexico.

### English Cucumber

Supplies have tightened up and we are seeing higher prices due to lower production yields as a result of cooler temperatures in the Canadian growing regions. Supplies are stable in California.



### Eggplant

East: Little to no change in supply, demand and pricing. NC, SC, and NJ are all producing good quality and volume.

West: Look for slight upward pressure on FOB prices as quality from Fresno and Stockton scuffles with the heat.

### Fennel

Supplies for the week will be light.

### Garlic

EXTREME - The 2017 crop is dying down. We are shipping US product; the market has somewhat stabilized.

### 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 going here in the central San Joaquin Valley now and we will be harvesting grapes here through November. The overall crop looks very good with a nice set and some very nice quality. We are seeing some burn due to the extreme heat we have been experiencing in some vineyards but at this point it looks to be minimal damage. We are harvesting a few different varieties (Sugarone, Ivory, Princess, Green Globe) of green grapes now and all look excellent with good sugar and very clean and green, the reds have been primarily flames and we are getting started in a light way on Sweet Scarlett's and Scarlett royals, and there will be more varieties of reds starting in the next few weeks.

### Green Cabbage

Green cabbage is steady and quality is good on both coasts.

### Red Cabbage

Quality and sizing great with good color. Market is stable.

### Green Onions

Iced: Prices are up, quality is good.

Iceless: This market is steady with good volume.

### Honeydew

Market is also starting to ease as well here on the Westside with volumes getting better, the fruit is very nice with a green to cream color and internal fruit color and condition is excellent. We are peaking on 4's and 5's keeping the smaller fruit very strong and tight, we will start to see some smaller fruit in a few weeks. We expect to have some better volumes by then as well, but the overall volume will be a bit lighter overall than last year. We will keep you posted as we go forward.

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## Produce (continued)

### Jicama

Normal prices and quality is good.

### Kale (Green)

Demand is steady and quality is just fair. Supplies are starting to lighten up with product being affected by heat damage.

### Kiwi

Shipments are beginning to wind down out of Chile and we are starting to see upward pressure on FOB prices. California should start in 3-4 weeks. Quality is still very nice.

### Lemons

Market is adjusting as we are seeing better volumes crossing from Mexico and the Chilean arrivals on both coasts has been steady and will continue to see good volumes arriving from both of these regions through the month. We are also harvesting California dist. 2 fruit and will be doing so through the month as well. The overall quality is fair on the California fruit with some skin breakdown and fruit just not as strong as we would like but this is typical for this time of year and some of this fruit is coming out of storage as well. The Imports are pretty strong and we are repacking if need be here once they have been through protocol. We expect to have good volume of lemons going forward and will also start our new crop Dist. 3 fruit around the first week of September.

### Lettuce:

#### Butter

Prices are stable. Quality has been good.

#### Iceberg

Size and solidity are across the board. Seeing either fields that are 40 lbs. or the lettuce is large and 50+ lbs. Seeing mildew and growth crack with occasional weak tip and internal burn. Some seeders being seen as well.

### Romaine

Moderate cupping in some fields with occasional internal burn and fringe burn. Other fields are looking good. Quality is fair to good.



### Romaine Hearts

Seeing wind burn, fringe burn and internal burn issues varying from lot to lot. Good green color.

### Green Leaf

Sizing is either 6 – 8” or 10-12” depending on supplier. Quality is good.

### Iceberg Blends

Mildew on wrapper leaf and internal burn. Seeder is causing more core than usual. Overall quality is good.

### Chopped Romaine/Romaine Blends

Occasional fringe burn/internal burn with wind burn. Color ranges from dark green to medium green. Good quality is fair to good.

### Limes

Limes are available. Great quality and color.

### Napa

Supplies are normal. Quality is good.

### Onions

Pricing has stabilized on yellow onions as supply and demand are equal. Washington is starting in a small way and Idaho/Oregon is expecting to start in the next 14 days. With this, it is likely we will see the market start to come off as the regions overlap. Red and White onions remain stronger as New Mexico and California are winding down supplies before the Northwest is starting. It is likely we will see those colors elevated until the Northwest ramps up volume.

### Oranges

Market is very strong and demand exceeds supply on 88's and 113's but very tight on all other grades and sizes as well, Valencia's will continue to stay very strong through the season as we are at least 20% lighter in volume versus last year. The overall quality of the fruit is fair to good, but they are Valencia's so you will a tinge of green and fruit will be on the softer side and some skin breakdown and some of this is due to our extreme heat we have been experiencing and is pretty typical for the summer Valencia's, The juice internal color and sugar content are excellent right now. We also need to remember that the fruit we are harvesting now bloomed in march of 2016 so the tree is carrying next years crop as well as this years, this fruit has been through the elements and hanging on the tree for 16 months. There are some Chilean navels arriving as well as Australian but mostly larger sizes, the overall quality is very nice and prices are much stronger than on Valencia. We will start California Navels around the middle of October.

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## Produce (continued)

### Parsley (Curly, Italian)

We are seeing prices that are still higher, the warm temperatures

### Green Bell Pepper

Pepper supplies and quality are improving slightly through North Carolina. Quality and shelf life remain a concern due to the recent rains. We are beginning to see light numbers from the Mid-Atlantic and Michigan regions as well, which should relieve some of the pressure on North Carolina. Central California production will continue to improve as well. We should see improving FOB prices over the next several weeks. We do need to keep an eye on Michigan as quality will be a struggle due to recent heavy precipitation.

### Jalapeño Pepper

East: Stable FOB prices with good quality and decent supply.

West: Quality is proving to be good with steady supplies. FOB prices are steady as well.

### Red Bell Pepper

Supplies are good through next week. Quality is excellent and FOB prices are down.

### Yellow Pepper

Extremely light supply crossing through Otay as well as loading in Somis.

### PINEAPPLE

Supplies have tightened up at the ports as well as forward distribution centers. We expect markets to remain snug for the next 3-4 weeks.

### Potatoes - ESCALATED

The new crop Idaho's got started in the state on Monday in a limited fashion. You should see a few more operations start Thursday of this week and a few more starting next Monday. By the week of the August 21st you can expect a good portion of operations with the ability to ship new crop Idaho's. You should expect higher prices than the old crop, and you should be able to see stable pricing for the next two weeks. Quality of the new crop looks very good at this time. The very first product did not have a large supply of 40's through 70's but that should get better each week as this early harvest gets under way. You still have a number of operations with old crop available, but the supplies are limited. If your customer needs Burbank's, they are going to have to rely on this old crop as the new potatoes being offered are of the Norkotah variety. You will not see new crop Burbank's until late September.

### 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 (Bunched)

Some mechanical damage, occasional burn. Supplies are becoming scarce.

### Spinach (Baby)

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

### Zucchini & Yellow Squash

GREEN - Domestic supplies are still good in the southeast and Michigan, prices are stable. In the west, Fresno and Santa Maria production continue to ramp up.

YELLOW - Supplies are improving daily and finally driving FOB quotes down. We do need to keep an eye on Michigan as quality will be a struggle due to recent heavy precipitation.

### Spring Mix

Issues with burn is causing a drop of available product. Varieties are slightly more plentiful.

### TOMATOES

#### EAST

#### Rounds

Supplies in the east are tightening up through all regions: The Carolinas, Tennessee and Virginia. We are seeing a slight tick up on FOB prices on all sizes. Quality will be hit and miss with continued showers throughout the region this week.

#### Roma

ESCALATED- Despite good volume, prices are still elevated. Quality has also become questionable due to rain related pressures.

#### Grapes

Supplies are mostly unchanged out of the Carolinas. Demand have improved and seeing an increase in FOB prices. Quality is becoming an issue as the region continues receiving precipitation.

#### Cherries

Supplies are improving; quality is hit and miss, so be sure not to keep large inventories on hand. FOB prices are down slightly.

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## Produce *(continued)*

### TOMATOES

WEST AND MEXICO:

#### Rounds

Vine-ripe production is now in full swing through Otay and McAllen in addition to the California production on greens. However, we are seeing some heat related quality issues and expect to continue seeing this for some time. FOB prices are varying based on sizes and are seeing upward pressure as production numbers are down in California due to the heat. San Diego County is now in full production.

#### Romas

ELEVATED - Supplies are slightly improving through Otay and McAllen as well as California. We should see some downward pressure in pricing over the next few weeks.

#### Grapes

Crossings are good from Baja. Quality has also improved. FOB Prices are unchanged this week.

#### Cherries

Supplies are mostly unchanged over the last week. Quality is good. FOB prices are down slightly.

### Tree Fruit

The market is level; apricot, nectarine, peach, and plum stocks are beginning to tighten. Nectarine and peach sugar levels vary from 11 to 12 Brix; plums are extremely sweet at 14 to 16 Brix.

### Watermelon

Good supplies are now available out of Texas; East coast has tightened up. California supplies are also improving. Fruit is cutting beautifully, deep red and sweet.

