



MARKET TRENDS

FOR WEEK ENDING SEPTEMBER 15, 2017

 **PERFORMANCE**
FOODSERVICE



MARKET TRENDS

SEPTEMBER 15, 2017

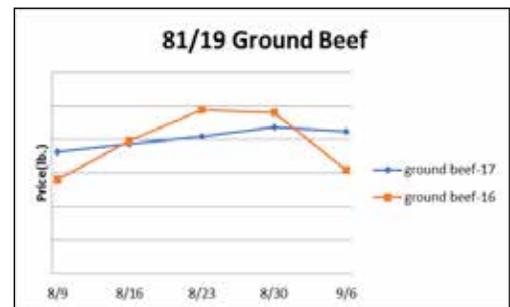
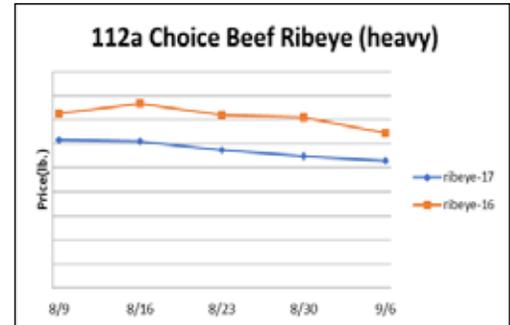
PERFORMANCE
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Beef, Veal & Lamb

Beef production last week declined 2.4% from the previous week and was just .1% larger than the same week last year. This was due in a large part to packers tempering output because of slow demand out of the Houston, Texas area. Beef production will be shortened this week as well due to the holiday. This could bring support to beef prices in the near term. Further, the existing low wholesale prices are encouraging some retail future activity. Beef forward sales for delivery 22-90 days out last week reached a six-week high, with ground beef sales the biggest since April. That said, the seasonal tendency in many of the markets is lower during September, which could take hold soon.

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	Increasing	Good	Higher
109 Export Rib (ch)	Decreasing	Good	Lower
109 Export Rib (pr)	Decreasing	Good	Higher
112a Ribeye (ch)	Decreasing	Good	Lower
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)	Decreasing	Good	Higher
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Increasing	Good	Lower
121c Outside Skirt (ch/sel)	Decreasing	Good	Lower
121d Inside Skirt (ch/sel)	Increasing	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)	Decreasing	Good	Lower
171b Outside Round (ch)	Increasing	Good	Higher
174 Short Loin (ch Ox1)	Increasing	Good	Lower
174 Short Loin (pr 2x3)	Decreasing	Good	Higher
180 Ox1 Strip (ch)	Increasing	Good	Higher
180 Ox1 Strip (pr)	Decreasing	Good	Higher
184 Top Butt, boneless (ch)	Decreasing	Good	Lower
184 Top Butt, boneless (pr)	Decreasing	Good	Lower
184-3 Top Butt, bnls (ch)	Decreasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Lower
185c Loin, Tri-Tip (ch)	Increasing	Good	Lower
189a Tender (sel, 5 lb & up)	Decreasing	Good	Lower
189a Tender (ch, 5 lb & up)	Increasing	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	Lower
75% Trimmings	Steady	Good	Higher
85% Trimmings	Decreasing	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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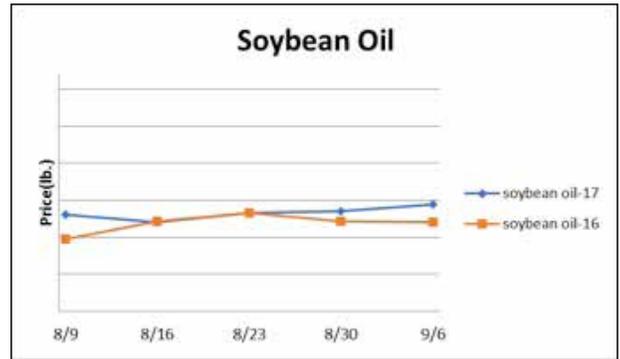
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Grains

The hard-red spring and durum wheat harvests in the U.S. are entering their final stages, which is putting downward pressure on prices. Still, hard red spring and durum wheat supplies are expected to be historically limited for the 2017-18 season due to the shortened output. Higher wheat prices may be impending.

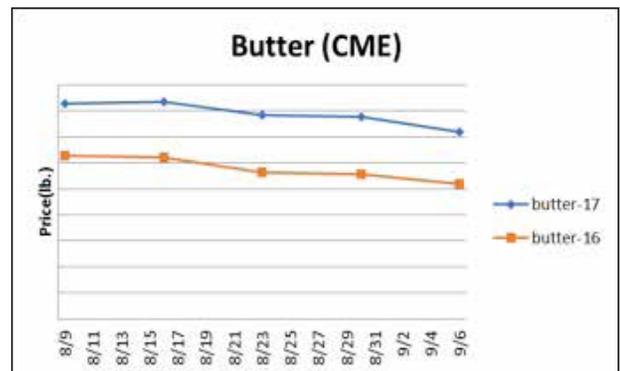
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Higher
Soybean Meal, ton	Increasing	Good	Lower
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher
Distillers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



Dairy

The CME butter market has moved counter-seasonally downward during the last week, reaching levels not seen since June. Milk and butter production in the Midwest have been better than expected as of late due to cooler temperatures in the region. However, CME butter continues to be priced well below the international markets, and export interest is building. This could temper the downside in butter prices into the fall. The CME cheese markets have found some modest support as of late. But like butter, cheese export interest is on the rise, which could support domestic prices.

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



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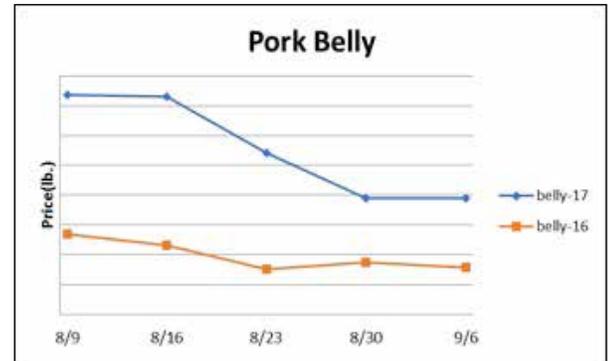
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Pork

Pork output last week declined 1.2% from the previous week, but was up 2.3% compared to the same week a year ago. Hog supplies are expected to seasonally improve during the next few months, which should fuel strong pork production. The USDA is forecasting Q4 2017 pork output to expand from Q3 by the largest volume in over a decade. This should generally put a lower bias on the pork markets this fall. The downside in the ham markets between now and mid-October may be minimal, however, as processors seeks supplies for the holidays.

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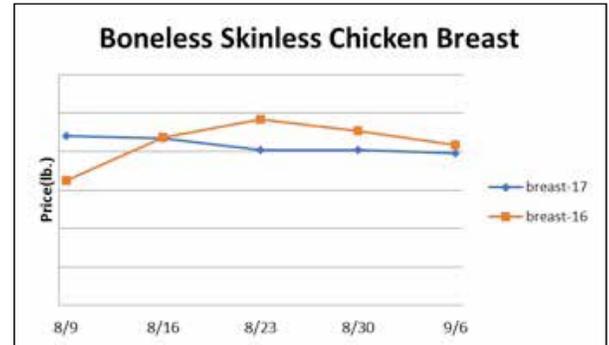
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Poultry

Chicken production for the week ending August 26th fell 1.8% from the prior week and was 1.6% less than the same week a year ago. The six-week moving average for chick placements stands at 2.7% above 2016. This suggests that, along with heavier bird weights, chicken output could track 3% plus above year-ago levels during the next month or so. Some of the best late summer margins for chicken producers in the last decade add fuel to better year-over-year chicken production gains this fall and into 2018. The August 1st broiler layer flock was 4.7% larger than the prior year, which also points to stronger chicken production expansion next year. If better chicken output gains materialize, it could put downward pressure on the wing markets.

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	Lower
Breast Boneless Index (ARA)	Decreasing	Good	Lower
Tenderloin Index (ARA)	Decreasing	Good	Lower
Legs (whole)	Decreasing	Good	Higher
Leg Quarter Index (ARA)	Decreasing	Good	Higher
Thighs, Bone In	Decreasing	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)	Increasing	Good	Lower
Turkey Breast, Bnls/Sknl	Decreasing	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	Increasing	Short	Higher
Liquid Egg Whites	Increasing	Short	Lower
Liquid Egg Yolks	Increasing	Short	Higher
Egg Breaker Stock Central	Increasing	Short	Higher



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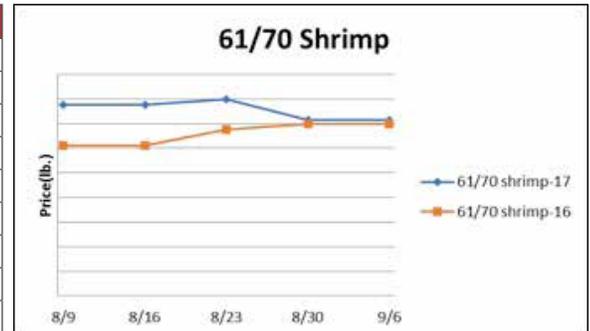
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Seafood

Retail seafood prices have generally been inflated during the summer, especially compared to beef and chicken. During July, retail seafood prices were .4% more expensive than the same month last year and a record high. If this trend continues, it may dampen domestic seafood consumption and influence several of the seafood markets downward.

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



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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	Jul '17	Jun '17	May '17
Beef and Veal	Increasing	Increasing	Increasing
Dairy	Increasing	Decreasing	Increasing
Pork	Increasing	Increasing	Increasing
Chicken	Increasing	Increasing	Increasing
Fresh Fish and Seafood	Decreasing	Increasing	Decreasing
Fresh Fruits and Vegetables	Increasing	Decreasing	Decreasing

Various Markets

Orange juice futures rose sharply early this week due to concerns around potential crop damage from pending Hurricane Irma. This could keep orange juice futures especially volatile in the near term. If no damage occurs, prices are likely to head sharply downward thereafter

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



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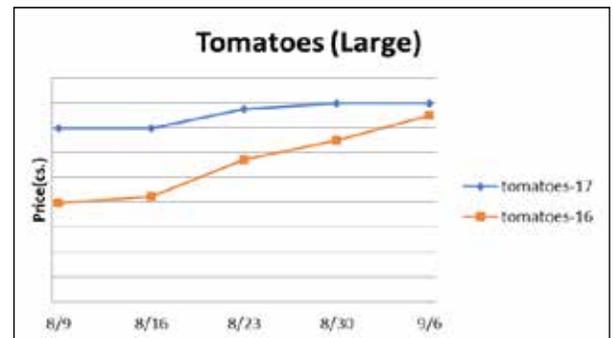
Produce

Lemons and oranges continue to be in a very **extreme market**. We are noticing a shortage in supply as well, which will continue until early fall. There is heat damage in almost all leaf and tender leaf products due to the heat. Strawberries are poor in quality and we are seeing a short supply. Asparagus is also in an extreme market. Melons and pineapples are a good buy. The avocado markets remain elevated due to short supplies. The Hass Avocado Board is estimating total avocado supplies this week to be near 44.3 million pounds, which is modestly better than the same week last year. However, the available supplies are anticipated to decline in the coming weeks. Last year, the 48 count Hass avocado market rose 16% during the next four-weeks before crashing sharply into November. The Idaho potato markets are starting to turn lower as the harvest improves. Usually the Idaho potato markets move sharply downward during the next several weeks.

WEATHER WARNING: We could see potential supply interruptions based on the current tracking of Hurricane Irma which could affect east coast production.

MARKET ALERT

- Apples – EXTREME
- Avocados – EXTREME
- Asparagus – EXTREME
- Cilantro – ESCALATED
- Cucumbers – ESCALATED
- Garlic – EXTREME
- Green Onions – ESCALATED
- Lemons – EXTREME
- Oranges – EXTREME
- Onions – ESCALATED
- Potatoes – ESCALATED
- Grape Tomatoes – ESCALATED
- Cherry Tomatoes – ESCALATED
- Round Tomatoes (East) – 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 have started in California and will see them in Washington soon.

Artichokes

Steady market with higher prices. Quality is good.

Arugula

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

Asparagus

Extreme: Peru supply is light but steady, and Mexico ended resulting in a gap in supply. With flights canceled from Peru into Florida we will be short in supply.

Avocados

Extreme due to domestic production finishing up, as well as offshore production winding down and in alignment with a slowly maturing FL local 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.

Berries

Blueberries

Blueberry availability will continue to decline. Quality is fair due to the heat.

Blackberries

Blackberries are decreasing in volume. Quality is average due to the heat.

Raspberries

Volume is light. Flavor and quality have decreased due to heat.

Strawberries

Extreme: The market is getting very active. The heat caused significant damage and quality is not good. We are seeing high prices and shortage in supply.

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 due to the heat. Quality is holding up.

Brussels Sprouts

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

Cantaloupe

Market has started to strengthen a bit and we are going in a good way here on the Westside, demand has picked up and volumes have been down due to the Extreme heat damage we have had in some blocks.. 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.

Carrots

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

Cauliflower

Market is good; supplies are plentiful and quality is very good. Prices are low.

Celery

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



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Produce (continued)

Cilantro:

Escalated: Quality is poor; there is still yellowing with some decay. Prices are high.

Corn

Increased volume available from Michigan and New York on bicolor. White, yellow and bicolor corn loading in the Central CA District is now available with good volume on white.

Cucumbers

Escalated: We are beginning to see yields dip as the summer harvests are coming to an end. We expect to see escalated markets for the next 7-10 days. We are also seeing a slight production gap in the west due to field transitions which is putting additional pressure on an already decreasing supply. Quality in the west is good while we still are seeing issues in the east. Supplies from the Dominican Republic will be an issue due to Hurricane Irma.

English Cucumber

Supplies are mostly unchanged. We should see some improvement as greenhouse production in Mexico is anticipated to ramp up over the next 10 to 14 days. Markets remain mostly unchanged.

Eggplant

East: Good volume and steady pricing is coming from mostly MI, NJ & SC. GA starting to come into the market place as their new crop begins

West: Solid volume from the west with good demand is resulting in a steady market. Quality is still generally good, however, some concerns could be present due to 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 Beans

Supplies are good out of Michigan and Tennessee this week. Quality has also improved, seeing less rust and mildew issues. Supplies in the west have improved slightly as well however need to watch as there are some heat related issues which are expected to be ongoing through the remainder of the California season. FOB prices are mostly unchanged for next week.

Green Cabbage

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

Red Cabbage

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

Green Onion

Escalated: Iced: Prices are up, quality is poor with heat related damage.

Iceless: This market is steady and we are seeing heat related quality issues.

Honeydew

Market starting to firm up as well here on the Westside with volumes effected by the Extreme heat as well, the fruit is very nice with a green to cream color and internal fruit color, sugar and condition is excellent. We are peaking on 4's and 5's keeping the smaller fruit a bit stronger, we will start to see

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Produce (continued)

some smaller fruit in the coming weeks. We will have fruit through mid October and then transition down to the desert. We will keep you posted if we see any more damage or shortages due to the heat.

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 for the most part finished out of Chile. What is in storage will be it for the season. Still looking for California to begin harvesting over the next 3 to 4 weeks. Markets remain very active with limited availability on the horizon. 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 Mexico and the Chilean are starting to slow down on arrivals but fruit will be around for the next few weeks. 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 in about 2 weeks.



California Lettuce

Butter

Prices are stable. Quality is average due to the heat.

Green and Red Leaf

Quality is fair, as we are seeing fringe burn. Demand is steady. Supply is ok.

Iceberg Lettuce

Supplies are plentiful this week. Quality is good. We are seeing lighter weights and yields in the fields.

Romaine

Good supply. Quality is overall fair to poor. We are still seeing fringe burn and yellowing on the outer leaves and other heat related issues.

Romaine Hearts

Supplies are good and prices are up. Quality is good to average; however, we can control some of the quality issues by peeling off some of the outer layers.

Limes

Limes are available. Great quality and color with most growers although some are reporting average quality with light color.

Napa

Supplies are normal. Quality is good.

Onions

ESCALATED: California and New Mexico are now completely finished and supplies are coming strictly out of the Northwest. Sizing is peaking on mediums and jumbos, while colossal and super colossals are extremely tight. Pricing has increased as the initial reports are showing that the crop is 25-30% short of last year's crop. On top of this, demand has been strong and growers are struggling to make enough onions with size.

Oranges

Market is very strong and demand exceeds supply on 88', 113's and 138's but very tight on all other grades and sizes as well, Valencia's will continue to stay very strong and demand exceeding supply, as we are at least 20% lighter in volume versus last year. The overall quality of the fruit is fair, but they are Valencia's so you will see a tinge of green and fruit will be on the softer side and some skin breakdown and just older looking fruit which a lot of this is due to our extreme heat we have been experiencing for at least the last 3- weeks and is pretty typical for the summer Valencia's. The juice internal color and sugar content are excellent right now.

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Produce (continued)

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. We will start California Navels around the middle of October, we are probably going to have a gap between Valencia's and navels probably around the end of September until we start navels around the third week of October, hopefully not but we will continue to keep you posted.

Parsley (Curly, Italian)

We are seeing prices that are still higher, the warm temperatures have cause quality issues.

Green Bell Pepper

Pepper supplies and quality are favorable; however, we anticipate a shift in sizing due to cooler overnight lows throughout the Mid-Atlantic, Michigan and North Carolina growing regions. California/ Central Coast production is now in full swing however we will need to keep a close eye on quality 10 to 12 days out due to this week's heat wave hitting the central valley and intercoastal regions. Currently, quality is outstanding and FOB prices are down.

Jalapeño Pepper

East: Steady prices driven by both good supply and good demand are present. Quality remains good.

West: FOBs are strengthening as supplies are in a transition period for about 14 days.

Red Bell Pepper

Red Pepper Supplies are good this with additional intercoastal fields breaking. We expect good quality over the next week however this could change should the extreme heat levels remain constant for the next several days combined with higher than normal overnight lows. We could see this affect shelf life and lower yields over the next 10 to 12 days.

Yellow Pepper

Supplies have eased in the west with additional intercoastal fields breaking. We expect good quality over the next week, however this could change should the extreme heat levels remain constant for the next several days combines with higher than normal overnight lows. We could see this affect shelf life and lower yields over the next 10 to 12 days

Pineapple

Supplies will be improving over the next 5 to 7 days as we are seeing increased shipments departing from Costa Rica. We expect markets to begin falling early next week. Reports from the field are that quality is excellent, fruit is heavy and brix are ranging from 12 to 13.

Potatoes:

Escalated: Demand on consumers in the state is poor at lower prices. Demand on cartons is good at lower price levels. The market is under pressure at this time and we can expect to be in this position for the next few weeks. Harvest is currently underway, and will increase over the next couple of weeks. This will continue to put pressure on this market. We have not seen any product heading into storage, but next week grower's will be putting away the new crop. This may help stabilize the market, but it will take some time. The quality of this crop has been excellent, and we are seeing average yields, hoping the yields get better as we move further into harvest. At this time, Mother Nature has been cooperative with the weather and we hope it will continue.

Radishes

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

Salad Blends

Prices are low. Raw product iceberg and romaine volume is high. Quality is average, but recent hot weather is increasing mildew pressure in some lots. Our inspector is closely monitoring shelf-life for best quality.

Snow and Sugar Snap Peas

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

Spinach (Bunched)

Supply is good and quality is fair due to heat related issues. We are seeing prices rise.



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Produce *(continued)*

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.

Spring Mix

There is plenty of product with quality being fair.

Yellow Squash

Supplies have turned back down in the east due to the cooler overnight temps. Quality is fair: reports have been received of lower shelf life, additional scarring and occasional surface mold issues. In the west, volumes are down, however, quality is good. FOB prices are firm in the west.

Zucchini Squash

Domestic supplies are tighter in the southeast and Michigan due to cooler overnight temps. We are seeing daily increases in FOB quotes. Quality is marginal in the east, starting to see duller looking fruit and compromised shelf life. In the west, Fresno and Santa Maria production has leveled off however FOB prices are moving up due to additional demand coming from the east coast. Quality in the west is very good, seeing deep green dry fruit with very little cosmetic defects.

Tomatoes – East

Rounds

Escalated: Supplies in the east are tight through all eastern regions, particularly on smaller sizes. Quality will be hit and miss with continued showers throughout the region this week. We will need to keep a close eye on the next growing areas as they could be affected by Hurricane Irma.

Romas

Supplies are lighter this week and prices have ticked upward once again. Quality remains an ongoing issue throughout the eastern growing districts due to the ongoing rain issues.

Grapes

Escalated: Supplies have tightened up significantly out of the Carolinas and Virginia. Prices have escalated and triggered. Quality is becoming an issue as the region continues receiving precipitation.

Cherries

Escalated: Supplies are mostly unchanged; however, we have seen continued quality issues. Be sure not to keep large inventories on hand. FOB prices are down slightly.

Tomatoes – West and Mexico

Rounds

Vine-ripe production continues through Otay and McAllen. The green market in California continues to struggle due to heat related quality issues such as lower shelf life and soft fruit. We could see a potential GAP between the California season and the fall crop in Nogales due to a potential bloom drop as well. We are receiving reports of production issues in Southern Baja related to Tropical Storm Lidia last week. We anticipate higher FOB prices this week.

Romas

Supplies are improving through Otay and McAllen. California is lighter than normal. We are seeing downward pressure on pricing, however the heat could turn things around. California quality will be in question due to the excessive heat; we expect to see tender fruit that will not have good shelf life.

Grapes

Escalated: Crossings are lighter this week from Baja and could see a supply interruption due to production delays and quality issues related to Tropical Storm Lidia. FOB Prices have increased again this week. We could see a potentially active market for the next 14 days.

Cherries

Escalated: Supplies are lighter this week and prices remain firm. Quality and sizing are good.

Tree Fruit

The market is starting to inch up. California apricot, nectarine, peach, and plum stocks will be shipped through this month. Stocks are diminishing; small sizes are especially limited. Nectarine and peach sugar levels range from 11 to 12 Brix; plum sugar levels vary from 14 to 16 Brix.

Watermelon

The westside region will continue to have supply through the middle of October. Seed varieties used in the Fall the past few seasons have been expanded as they proved to be resistant to cooler weather that hits that region in October. Central Arizona should be ready in early October and Guatemala started planting last week with an early to mid-November start expected.