



# MARKET TRENDS

FOR WEEK ENDING JUNE 15, 2018



# MARKET TRENDS

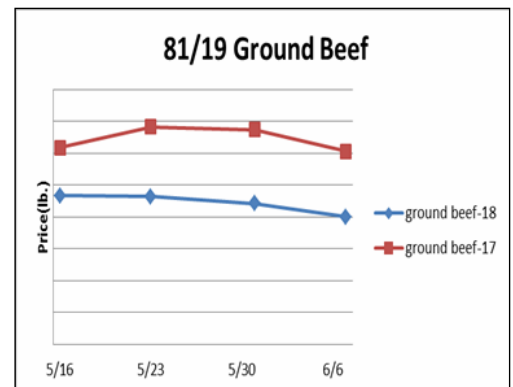
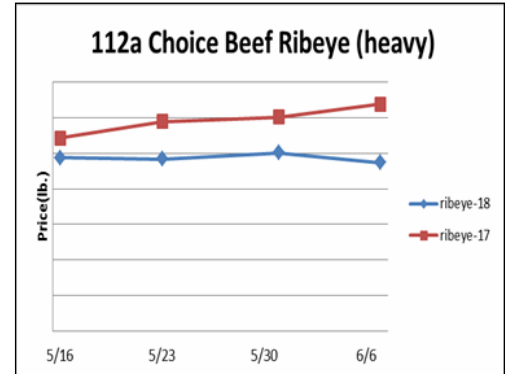
JUNE 15, 2018



## Beef, Veal & Lamb

Beef output last week fell 10.1% from the prior holiday shortened week but was 3.5% larger than the same week a year ago. Recent cattle on feed data hints that strong year-over-year gains in beef output should last into the summer. Per the USDA, the May 1st U.S. cattle on feed inventory was 5.1% larger than last year, but cattle placements into feedlots during April were down 8.3%, the second consecutive month of lower placements. This could result in a cattle supply gap this fall. Beef demand is strong. For the four-week period ending last Friday, forward beef sales were a whopping 34.5% better than the previous year. Still, history suggests that many beef items can soften now through July.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Lower
Feeder Cattle Index (CME)	Increasing	Short	Lower
Ground Beef 81/19	Decreasing	Good	Lower
Ground Chuck	Decreasing	Good	Lower
109 Export Rib (ch)	Increasing	Good	Lower
109 Export Rib (pr)	Decreasing	Good	Lower
112a Ribeye (ch)	Decreasing	Good	Lower
112a Ribeye (pr)	Decreasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Decreasing	Good	Lower
116 Chuck (sel)	Increasing	Good	Higher
116 Chuck (ch)	Increasing	Good	Higher
116b Chuck Tender (ch)	Increasing	Good	Lower
120 Brisket (ch)	Increasing	Good	Lower
120a Brisket (ch)	Increasing	Good	Higher
121c Outside Skirt (ch/sel)	Increasing	Good	Lower
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Decreasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Lower
168 Inside Round (ch)	Decreasing	Good	Lower
169 Top Round (ch)	Decreasing	Good	Lower
171b Outside Round (ch)	Decreasing	Good	Lower
174 Short Loin (ch 0x1)	Increasing	Good	Higher
174 Short Loin (pr 2x3)	Increasing	Good	Lower
180 0x1 Strip (ch)	Increasing	Good	Higher
180 0x1 Strip (pr)	Decreasing	Good	Lower
184 Top Butt, boneless (ch)	Decreasing	Good	Higher
184 Top Butt, boneless (pr)	Increasing	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Lower
185a Sirloin Flap (ch)	Decreasing	Good	Lower
185c Loin, Tri-Tip (ch)	Increasing	Good	Lower
189a Tender (sel, 5 lb & up)	Increasing	Good	Lower
189a Tender (ch, 5 lb & up)	Decreasing	Good	Lower
189a Tender (pr, heavy)	Increasing	Good	Lower
193 Flank Steak (ch)	Increasing	Good	Higher
50% Trimmings	Decreasing	Good	Lower
65% Trimmings	Decreasing	Good	Lower
75% Trimmings	Increasing	Good	Lower
85% Trimmings	Increasing	Short	Lower
90% Trimmings	Decreasing	Short	Lower
90% Imported Beef (frz)	Steady	Good	Lower
95% Imported Beef (frz)	Decreasing	Good	Lower
Veal Rack (Hotel 7 rib)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Higher



# MARKET TRENDS

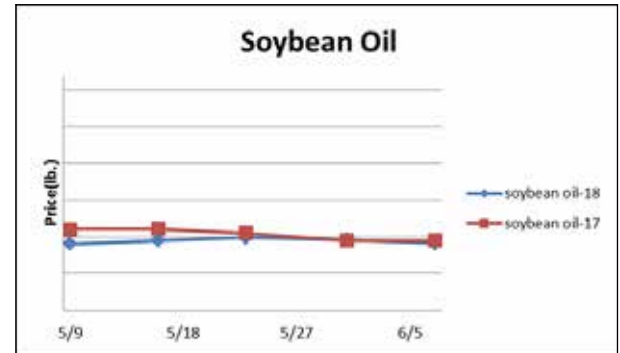
JUNE 15, 2018



## Grains

The U.S. 2018-19 winter wheat harvest is underway with 5% in the bin as of June 3rd. The crop has been challenged by adverse weather for just about the entire growing season, and crop ratings are some of the worst for this time of the year in the last two decades. This could underpin wheat prices this month.

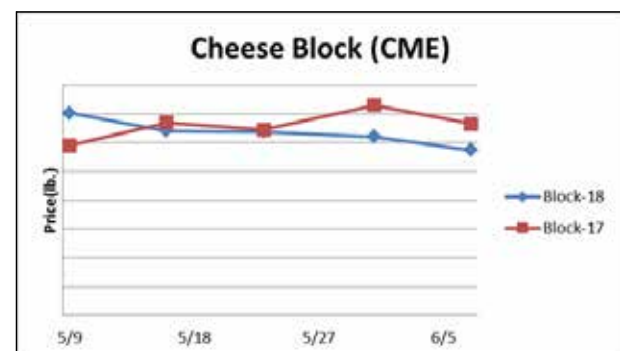
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Higher
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Higher
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Higher
Distillers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



## Dairy

During April, U.S. cheese output was just .9% better than the prior year. This is due in part to a bigger share of milk output going to California during the month. U.S. milk production in the largest cheese producing state, Wisconsin, during April was down .6% from 2017. Mexico this week announced import tariffs that will rise during the next month on cheese imports from the U.S. The country in 2017 accounted for 28.3% of our cheese exports. This could weigh heavy on the cheese markets in the near term. U.S. butter output in April was 8.3% bigger than the prior year.

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



# MARKET TRENDS

JUNE 15, 2018

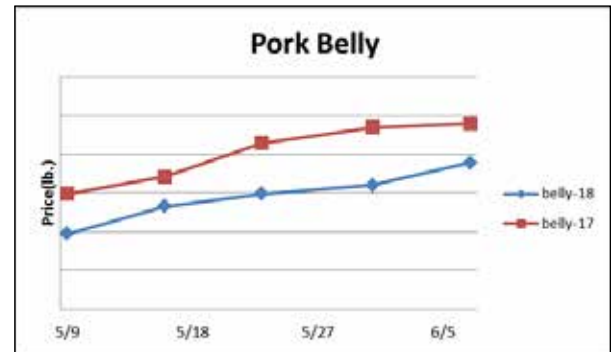
**PERFORMANCE**  
FOODSERVICE



## Pork

Pork production last week was 11.7% smaller than the prior holiday shortened week but was up 4% from the same week in 2017. Pork output is likely to seasonally wane in the near term but remain above year ago levels. In Q3, production is forecasted by the USDA to rise from Q2 by 140 million pounds. This should temper any notable upward price pressure on pork this summer. Mexico said it is implementing a 20% tariff on U.S. hams. Since 2013, the average move for the ham (23- 27 lb.) market over the next five weeks was up 20.4%.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Increasing	Ample	Lower
Sow	Decreasing	Ample	Lower
Belly (bacon)	Increasing	Good	Lower
Sparerib(4.25 lb & down)	Decreasing	Good	Lower
Ham (20-23 lb)	Increasing	Good	Lower
Ham (23-27 lb)	Increasing	Good	Higher
Loin (bone in)	Decreasing	Good	Lower
Babyback Rib (1.75 lb & up)	Decreasing	Good	Higher
Tenderloin (1.25 lb)	Decreasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Decreasing	Good	Lower
Picnic, untrmd	Increasing	Good	Lower
SS Picnic, smoker trm box	Increasing	Good	Lower
42% Trimmings	Increasing	Good	Lower
72% Trimmings	Increasing	Good	Lower



# MARKET TRENDS

JUNE 15, 2018

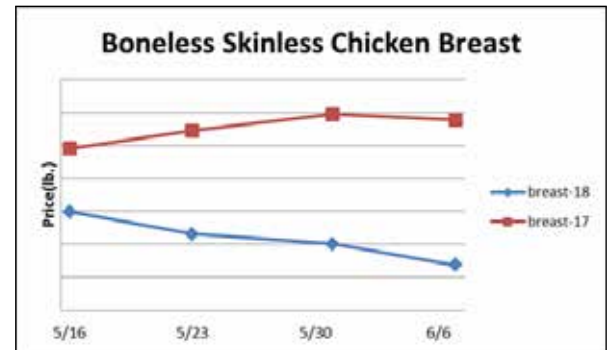
**PERFORMANCE**  
FOODSERVICE



## Poultry

For the week ending May 26th, chicken output fell .6% from the previous week and was .9% smaller than the same week a year ago. For the six weeks ending May 26th, chicken production was tracking just .5% above 2017. Chicken producers have seen feed costs rise this year while chicken prices have faded. If this trend persists, then only modest year over year output gains may occur due to smaller margins. This could support the chicken markets this summer. April 30th chicken stocks were 9% more than last year but breasts were down 3%, and leg quarters were smaller by 3%. This week Mexico failed to announce any tariffs on U.S. chicken, but it is a big buyer of boneless skinless thigh meat. Chicken thigh meat prices are usually choppy in June.

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



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

## Eggs

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



# MARKET TRENDS

JUNE 15, 2018

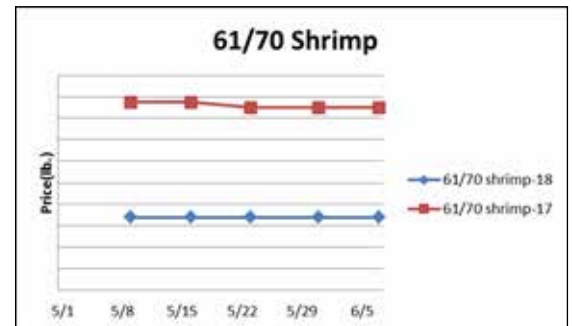
**PERFORMANCE**  
FOODSERVICE



## Seafood

Most seafood consumed in the U.S. is imported and is subject to currency change valuations. The value of the U.S. dollar has risen rather sharply this spring with the official index climbing to a two-year high. This makes the U.S. an even more attractive destination for the world's seafood which should encourage exports and temper the various seafood markets.

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



# MARKET TRENDS

JUNE 15, 2018

**PERFORMANCE**  
FOODSERVICE



## Paper and Plastic Products

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

## Retail Price Change from Prior Month

Description	Apr-18	Mar-18	Feb-18
Beef and Veal	Increasing	Increasing	Increasing
Dairy	Decreasing	Increasing	Decreasing
Pork	Decreasing	Increasing	Decreasing
Chicken	Increasing	Increasing	Increasing
Fresh Fish and Seafood	Increasing	Increasing	Increasing
Fresh Fruits and Vegetables	Increasing	Decreasing	Decreasing

## Various Markets

Cocoa prices have moved lower as of late with the nearby futures market this week falling to its least expensive level since March. Cocoa landings in West Africa are tracking below last year, but the weather outlook has improved. Cocoa prices may see more downside potential in the near term.

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	Higher
Orange Juice lb ICE	Decreasing	Good	Higher
Honey (clover) lb	Steady	Good	Higher



# MARKET TRENDS

JUNE 15, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce

### Market Overview

Most commodities are steady. Valencias are now in an ACT OF GOD with higher prices and shortages in supply. Lemons remain higher in prices and tighter in supply. Lettuces and salad blends are steady.

### Watch List

#### Southeastern Vegetables

Cherry tomato and Grape tomato production have been severely impacted by heavy rain over the past several weeks leaving up to 5 inches of rain in some isolated areas. Though not damaging to the point of a hurricane, it has caused the tail end to the Florida programs to end prematurely on some commodities while delaying the spring harvest in South Georgia and South Carolina. We do expect the conditions to improve by the first of next month as growers are going into fields, harvesting good numbers on squash, cucumber and eggplant with Roma tomato, round tomato and green bell pepper production improving as well.

### Transportation

Rates, although higher than expected, have eased as overall demand is lower. However, we do expect to see rates begin to increase as we approach the summer months as there is still an overall shortage of drivers.

### Apples & Pears

The market is stable. Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are on the market; large Granny Smith supplies are decreasing, but all other varieties are ample. Quality is very good: sugar levels range from 14 to 18 Brix.

Pear prices are unchanged; 80- to 90-count supplies are abundant. Washington D'Anjou Pears are available. Red D'Anjous and Argentine supplies are also on the market. New crop California Bartletts will begin shipping by the end of the month. Quality is excellent: sugar levels vary from 12 to 14 Brix.

### Artichokes

Quality is excellent, and demand is good.

### Arugula

Quality is fair due to the recent cold weather.

### Asparagus

Prices are steady; supplies are increasing. Quality is best in Mexico: stalks are straight and firm, while flavor is pleasantly grassy.

### Avocados

Markets are steady. There is a good balance between supply and demand. A lot of fruit that was older has cleaned up, keeping markets steady. There is still a larger percentage than normal of #2 fruit, which is keeping the market from firming up too much. Shipments from Peru have started to arrive and are heading towards programs. California is struggling to get bigger sizes and continues to be heavier on 60's and smaller.

### MARKET ALERT

- Lemons – ESCALATED
- Mushrooms – ESCALATED
- Oranges (Valencias) – ACT OF GOD
- Tomatoes (East Coast – Grapes and Cherries) – ESCALATED





# MARKET TRENDS

JUNE 15, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce *(continued)*

### Bananas

Guatemala banana volumes and quality are not expected to be affected by the volcano. Supplies continue to be good with the light summer demand.

### Beans

EAST: Little supply from FL is trickling in, but GA is supporting most of the demand. Quality is quite skippy right now, so we recommend tightening up inventory. FOBs are up.  
WEST: FOBs remain high as more growers are slow to come on board and quality is sporadic. Look for things to shift for the better in about 10 days.

### Berries:

#### Blackberries

Prices are rising. Although most production is now in Central Mexico, California supplies have decreased in Oxnard and Watsonville. Quality is good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels vary from 12 to 13 Brix.

#### Blueberries

The market is elevated. Volume is low in Santa Maria and Watsonville, California, as well as Mexico, but should increase this month. Quality is average: berries are deep blue with a slight blush and sweet, yet tangy flavor.

#### Raspberries

Prices are steady; California stocks are sufficient. The market will continue easing through June. Quality is average: berries are plump and sweet. Sugar levels range from 13 to 14 Brix.

#### Strawberries

The market is steady; volume is high in California's Santa Maria and Salinas/Watsonville growing areas. Prices should remain level through June. Quality is very good: berries are firm, yet juicy and sweet.

#### Bok Choy

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

#### Broccoli

The market has eased. Domestic stocks are ample. California quality is very good: discoloration and hollow core are slight issues.

#### Brussels Sprouts

Supplies are light and quality is good. Prices are steady.

### Cantaloupe

Market is steady with light supplies due to the cooler than normal weather in the California and Arizona deserts. We have started the desert regions in a light way and will see some better volumes next week out of Arizona and the Imperial Valley. The fruit looks very good with a clean net a nice internal color and descent sugars. The first fruit has been peaking on 9's and Jumbo 9's keeping the smaller fruit very tight. We will be in the Imperial Valley and Arizona through June and then start here on the Westside around the first of July.

### Carrots

We are seeing both good quality and volume.

### Cauliflower

The market is low; California supplies are ample. Light bruising, decay, and oxidation are minor problems.

### Celery

Prices are near the bottom; volume is high. Quality is very good: pith and growth cracking are slight issues.

### Cilantro

Supplies are good. Quality is fair.

### Corn

Good volume continues on yellow and white out of the desert. Georgia sweet corn (yellow, white and bi-color) market is marginal; quality has been hit and miss due to the recent rains.



# MARKET TRENDS

JUNE 15, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Cucumbers

EAST: Florida is wrapped up for the most part with anything left coming from the fields having major quality concerns. GA still has good supply and fair to good quality. North Carolina is starting to bring some supply that will bring the needed relief. However, many farms have received quite a bit of rainfall. We could see rain related quality issues in the upcoming weeks. FOBs are up.

WEST: Although the gap has closed slightly between Nogales & So Cal, there is still a difference in pricing. MX's fruit is still suffering quality issues while So Cal is better. However, as more farms come on board, California's pricing and availability should level out.

### Eggplant

EAST: Quality is suffering from the remaining Plant City flush with GA on the horizon to start any day. FOBs are stable, but may shift upwards as the transition begins.

WEST: Most supply is coming from the CA desert area with good supply and quality. FOBs are steady.

### Fennel

Supplies for the week will be good and quality is good.



### Garlic

We are about 50% done with the 2017 crop. Supplies will remain tight between now and July. Prices remain high.

### Ginger

Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Costa Rica and Honduras and Peru with no major quality issues being reported.

### Grapes

We are getting much lighter volume than normal out of Coachella and Mexico as the weather has been cooler than normal and fruit coming on slower due to the weather, we have flames, perlettes and Sugarones with very light volume demand exceeds supply at this time. We are expecting about 15 million cartons out Mexico compared to last year's crop of 20 million, which will keep prices fairly firm. The Coachella Valley fruit is also behind schedule due to the cooler than normal weather but have started but, very light volume on reds and perlettes and also starting some sugarone, their volume down about a million as well estimated about 5 million cartons. The overall quality looks good and sugar will continue to get better, also the way things are looking the volumes out of both districts look to be lighter than projected it could stay tight through June and first of July. We should start here in the central valley around the third week of July and that will carry us through the first of December.

### Green Cabbage

Supplies have improved in the southeast as well as in the West. FOB calls are down, and quality remains very nice.

### Red Cabbage

Quality has been hit and miss while sizing remains good. We are seeing some external quality and color issues causing markets to remain firm in the East as well as Texas. West Coast volume is improving.

### Green Onions

Good volume crossing from Mexico. Quality should improve with night time harvesting.

# MARKET TRENDS

JUNE 15, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Honeydew

Market very strong with good demand across the board on all sizes, they are on the tight side. The overall quality has been very nice with a nice green to cream exterior and very good sugar and a tight cavity. We have started in a light way out of Arizona and Mexico and the Imperial Valley and volume will hopefully increase next week. The overall honeydew volume in the ground is lighter than normal, and the overall supplies will be lighter than normal so the market will probably stay strong through the deal. We will also start some Westside volume around the first week of July and that will carry us through mid-October.

### JICAMA

Markets remain firm due to ongoing short supplies and will continue to see some quality and shelf life issues.

### Kale (Green)

Quality and supplies are good.

### Kiwi

New Crop, Chilean fruit is available. Supply and quality are both good.

### Lemons

Market is strengthening and Dist. 1 is finished. The Dist. 2 fruit does have some smaller fruit but we are size picking getting the larger fruit off the tree. The 165's and smaller are getting very tight and limited, expect prices to start strengthening especially on the smaller fruit. The overall quality is good with some good color and excellent juice content, but the choice will be a bit more scarred up due to dist. 2 wind scar and snail damage etc. and just an overall rougher texture. There has been some Argentinean fruit arrive on the east coast but minimal volume, the first arrivals quality was just fair, it is yet to be seen what the fruit will be going forward, but we will keep an eye on the equality and advise as we see more arrivals. The first of the Chilean will start to arrive around next week as well. We will also start some Mexican fruit around the end of July; the Mexican volume is expected to be about 30-40% lighter than normal. Hopefully we have a good summer with no gaps and quality stays good on all the imported and domestic fruit.

### Lettuce:

#### Butter

Demand is good, and quality is average.

#### Green and Red Leaf

Red leaf quality and demand are average and supplies are normal. Green leaf supplies exceed demand and quality has been good with occasional fringe burn.

### Iceberg Lettuce

Supplies are lower due to cooler weather. Quality is extremely good.

### Romaine

Supplies exceed demand and quality is good.

### Romaine Hearts

Supplies exceed demand and quality is very good.

### Limes

The market is low; supplies are ample, especially 175-count and smaller sizes. Quality is very good: breakdown is minimal and occasional discoloration is merely cosmetic and will not affect taste or shelf-life.

### Napa

Supplies and demand are steady.

### Onions

Prices are level; supplies are adequate. The Washington yellow onion storage season will end next week. Most Texas-grown, fresh-run Onions will be depleted this week. Quality is very good: fresh-run onions have feathery skins and light color/exterior skins. Ample supplies of Red and Yellow Onions are available in California and New Mexico.



# MARKET TRENDS

JUNE 15, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Oranges

Market very strong across the board demand exceeds supply on 88's, 113's and 138's which will continue as we have been saying this crop is about 40% lighter than normal and will finish up much sooner than the past few years probably next week. We have started some Valencia's which will help on the smaller fruit but it is also a lighter crop so we will be fighting on smaller fruit through the year until we start navels around the first of November. The bloom for next year's crop was real heavy but we are experiencing some heavy bloom drop already and there are several different stages of the blooms due to our erratic weather we have had this winter. We will keep you posted going forward as we learn more over the next few months as to what next year's crop is looking like for Navels and Valencia's. The overall quality of the navels is good with excellent sugar and beautiful color, we are seeing some internal separation and puff and crease which is pretty normal for this time of the year.

### Parsley(Curly, Italian)

Quality is fair and supplies are good.

### Green Bell Pepper

EAST: Plant City still has some light supply coming from the fields but quality is mostly poor. Georgia is producing better supply bringing FOBs down slightly. Quality from looking good from the GA region.

WEST: CA is the dominant player in the west but supply still limited. Quality is only average with heat related problems. FOBs are steady.

### Jalapenos (Chiles)

EAST: Plant City is still pushing some supply, but the transition to GA will begin soon. FOBs are up slightly.

WEST: Baja being the dominant player has good supply and good quality. FOBs are steady.

### Red and Yellow Bell Pepper

The domestic market is up; supplies are adequate in California and Georgia. Mexican stocks will cross into Nogales, Arizona for two more weeks. Quality varies from good to very good: skins are deeply colored and flavor is subtly sweet.

### Pineapple

Volumes will begin to ease off starting in mid-June and into July. Where there was an excess of fruit in Q1, there's likely to be a decrease of fruit in Q3. Size profile will also shift, as we've already been experiencing. Overall fruit quality will be good.

### Idaho Potatoes

We are looking another increase this week on all sizes 80ct and larger. This appears to be the type of market we will continue to see for the balance of the Idaho season. We have only 7 weeks left of old crop, we expect most shippers to pack their first box of new Idaho Norkotah russets the first week of August..

### Radishes

Supplies are steady, and quality is good shipping through Arizona and Florida.

### Salad Blends

Prices are stable; iceberg and romaine stocks are abundant. Quality is very good: inspectors are selecting the best fields for harvesting.

### Snow and Sugar Snap Peas

Snow and sugar snap peas supplies are steady through Miami and prices are higher.

### Spinach (Bunched)

Quality is fair with some sizing issues due to recent cold weather.

### Spinach (Baby)

Baby and clipped spinach supplies are good, and quality is fair.



# MARKET TRENDS

JUNE 15, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Spring Mix

The market is level; Salinas Valley stocks are increasing. Quality is very good: yellowing is a slight issue in tango and breakdown is an occasional problem in green/red romaine.

### Yellow Squash / Zucchini

EAST: Florida has for the most part ended with GA bringing most supplies to market. NC should be starting any day now, however, they too have had quite a bit of rain. Quality is a big struggle with major scarring and fast onset decay. We recommend keeping a tight inventory. FOBs are steady, but better quality is demanding a higher price point.  
WEST: Santa Maria & Fresno are the dominant players. Quality is still only fair at best with major wind scar being the biggest issue. FOBs are steady.

### TOMATOES-EAST

#### Rounds

Although rainfall has slowed, we will continue to see the effects on the crop for the next few weeks as things move north up the coastline. Palmetto/Ruskin has mostly wrapped up with limited volume left lingering. Quincy and South Carolina are just starting to scratch the surface. Smaller sizes continue to be a bit less available as fruit was left on the vine longer during the rainfall. FOBs are quite spread during this transition period. However, with demand still fairly light, FOBs are mostly stagnant week over week. Quality continues to be very suspect so we highly recommend keeping a tight inventory through the transition period.

#### Romas

Romas plantings are generally lighter, so as the Palmetto/Ruskin crop winds down, supply has become increasingly less available. Rains have heavily affected the crop, weakening overall quality. But with light demand, FOBs are fairly steady with some better quality demanding a higher price point. We highly recommend keeping a tight inventory through this transition up the coast.

#### Grapes

Continuous light supplies are keeping FOBs high. Additionally, quality has been very poor due to weather conditions. For the next two weeks approximately, we recommend keeping inventory as tight as possible. Shelf life will be significantly affected.

#### Cherries

Light supplies continue to come from Palmetto/Ruskin. FOBs are mostly steady. Quality is still very suspect. It is recommended to keep a tight inventory through the transition period.

### TOMATOES-WEST/MEXICO

#### Rounds

Mature greens from MX are done with only one CA grower still going with very limited supplies, not enough to cover demand. Most demand is turning to MX vine ripers to keep the pipeline filled. Quality is mostly good, but there is still tender fruit coming from both CA and MX. FOBs remain about the same.

#### Romas

Great supply and quality is coming from multiple regions, Western MX, Northern MX, and Baja. FOBs remain low. Great supply is expected to continue and quality remains mostly good.

#### Grapes

Although FOBs are mostly steady, there is still a wide range in quality. Nogales is poor with Baja showing better quality, but lower supplies. Volume is expected to turn around in about 7 days.

#### Cherries

Most demand and volume has shifted to Southern CA as Nogales' quality is too poor to ship. FOBs are steady week over week and quality is mostly good.

#### Tree Fruit

Prices have stabilized; supplies of California nectarines and peaches are increasing. Plums are now also available, but volume is low. Quality is very good: sugar levels will rise as the season progresses.

#### Watermelons

The market is elevated. Stocks are limited in Florida due to recent rain. The Mexican season is winding down. Quality is very good: melons are juicy and flavor is mildly sweet. Sugar levels will increase as the season progresses.

