



MARKET TRENDS

FOR WEEK ENDING JULY 6, 2018



MARKET TRENDS

JULY 6, 2018

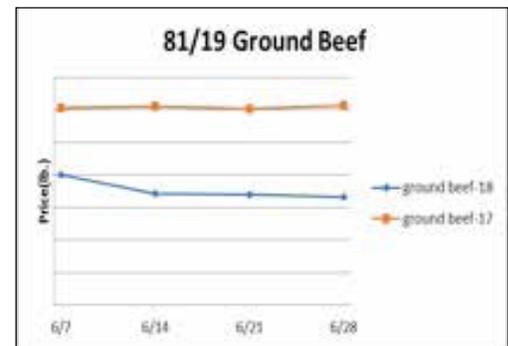
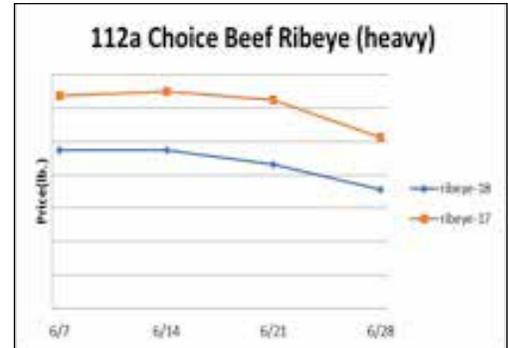
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Beef production last week rose 1.7% and was 3.2% bigger than the same week last year. The June 1st cattle on feed inventory was 4.1% larger than the prior year with May placements into feedlots up .2% from 2017. Slaughter ready cattle supplies will be readily available this summer, but there is some concern that a brief supply gap may occur this fall. Strong year-over-year beef output gains this summer should push prices downward into July. May 31st boneless beef stocks were 13.3% larger than the prior year. The 50% beef trim market is usually choppy in July but moves lower thereafter. Since 2013, the average move for 50% beef trim prices from August through mid-October was down 37.1%.

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



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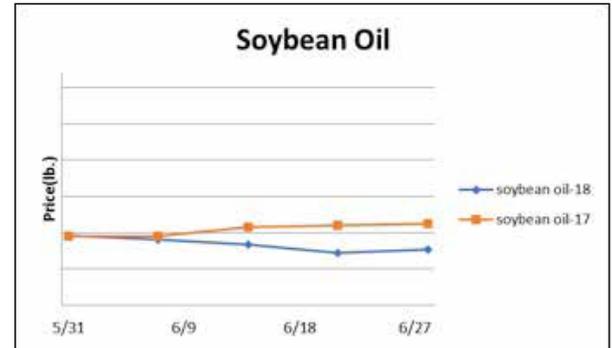
PERFORMANCE
FOODSERVICE



Grains

The recent tariffs being applied on U.S. grain imports are influencing the grain markets downward. Furthermore, the U.S. corn and soybean crops are off to a great start which is also weighing on prices. But, forecasts are now calling for above normal temperatures for the Midwest. The grain markets are due for a correction higher.

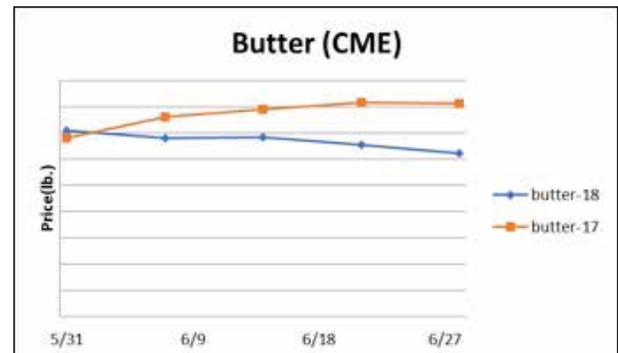
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Steady	Good	Higher
Distillers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



Dairy

Butter supplies in the U.S. have been adequate despite strong exports. As of May 31st, U.S. butter holdings were 8% larger than last year. Further, the stock build during May was the 2nd biggest in 36 years. Solid exports and rising demand for cream could temper the downside in butter prices this summer, though. May 31st cheese stocks were 5.9% larger than 2017 and a record for any month. Further, the May cheese build was the biggest since 1999. The Mexican tariff on cheese imports from the U.S. could keep a bearish bias over cheese barrel prices during the next several months.

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



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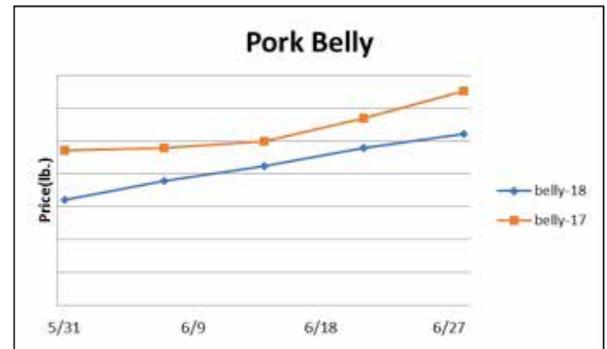
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Pork

Pork output last week fell 2.7% but was 2.5% better than the same week in 2017. Hog slaughter was the smallest for any non-holiday week since July 2016. Per the USDA, pork production this summer is likely to be 4.2% more than last year. This should keep pork prices at bay. May 31st U.S. pork stocks were 6% more than 2017 with picnics (30%), bellies (94%), trim (49%) and rib (4%) holdings all higher. It was the first monthly decline for bellies since July. History hints that many of the pork markets could seasonally peak this week or next.

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



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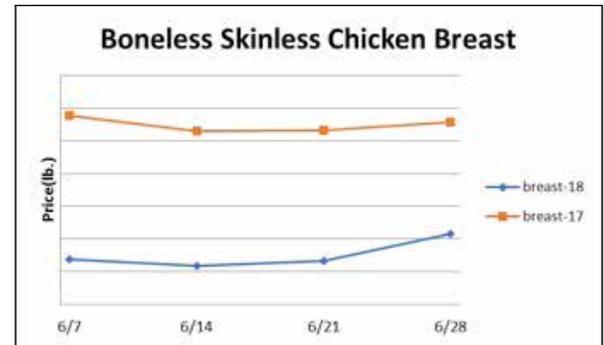
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Poultry

Chicken production for the week ending June 16th rose .1% from the prior week but was 1.9% less than a year ago. The six-week running total of chicken output is 1% smaller than last year. Yet, lower feed costs for chicken producers have materialized, improving margins. This should encourage better year-over-year gains in output. The USDA is calling for July through December chicken production to be 2% better than last year. Chicken producers may be trying to grow output longer term as well. The number of broiler layers as of June 1st was 3.8% larger than last year. Chicken wing prices are the cheapest for this time of year since 2014. May 31st chicken wing stocks were the highest in 18 months. Still, wing prices usually rise in the summer.

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



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

Eggs

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



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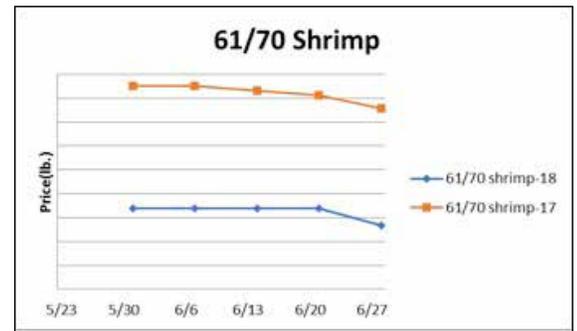
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Seafood

The Atlantic salmon filet market continues to track at or below year ago levels. This, despite lackluster imports. During April the U.S. imported 8.6% less salmon than the previous year. The value of the U.S. dollar has risen rather sharply since April which makes the U.S. a favorable destination for imports. This could temper salmon prices this summer.

Description	Market Trend	Supplies	Price vs. Last Year											
Shrimp (16/20 frz)	Decreasing	Good	Lower											
Shrimp (61/70 frz)	Decreasing	Good	Lower											
Shrimp Tiger (26/30 frz)	Increasing	Good	Lower											
Snow Crab, frz	Increasing	Good	Higher											
Tilapia Filet, frz	Increasing	Good	Higher											
Cod Filet, frz	Increasing	Good </tr <tr> <td>Tuna Yellowfin, frsh</td> <td>Decreasing</td> <td>Good</td> <td>Higher</td> </tr> <tr> <td>Salmon Atlantic Filet, frsh</td> <td>Increasing</td> <td>Good</td> <td>Lower</td> </tr> <tr> <td>Pollock Filet, Alaska, frz</td> <td>Decreasing</td> <td>Good</td> <td>Lower</td> </tr>	Tuna Yellowfin, frsh	Decreasing	Good	Higher	Salmon Atlantic Filet, frsh	Increasing	Good	Lower	Pollock Filet, Alaska, frz	Decreasing	Good	Lower
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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	Lower
PP-HIGP-heavy grade utensils	Steady	Good	Higher
PE-LLD-can liners, film, bags	Steady	Good	Lower

Retail Price Change from Prior Month

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

Various Markets

The coffee markets continue to trade at engaging levels for buyers as the world supply is modestly building. Further, the deflated Brazilian Real, makes Brazilian coffee less expensive for international buyers. History suggests that the downside price risk in coffee from here is nominal, however.

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



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Produce

Market Overview

Most commodities are steady. Valencias are still in an ACT OF GOD with higher prices and shortages in supply. Lemons, green beans, and certain sizes on asparagus remain higher in prices and tighter in supply. Lettuce is steady.

Watch List

Southeast Region: Tomatoes are tight due to slow transition and harvest delays caused by the excessive rainfall.

Limes: Our supplier is requiring orders in this week as they are unable to take any orders from June 30 – July 4.

Avocado: Though July is expected to be somewhat stable, recent above normal precipitation in Mexico will affect the August supply of avocados harvested in those regions. This will ultimately cause a spike in the market and possible gaps due to both the delays in the Flora Loca crop and an early completion of the winter crops that we have been receiving supplies from. Crop forecasts of the Flora Loca crop are indicating a sharp skew in the size curve to smaller fruit which is drawing a premium on an already short large-grade avocado. On the domestic harvest, we are seeing an early peak in production that is further adding to the pressure of a short market. We may not see relief until mid-October when we cycle back around to the fall harvest.

Apples & Pears

Prices are mostly unchanged. Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are available; large-size Granny Smith supplies are tight. Quality is very good: sugar levels range from 14 to 18 Brix. The market is level; 80- to 90-count stocks are ample. Washington D'Anjou Pears are on the market. Red D'Anjous and Argentine supplies are also available. New crop California Bartletts will begin shipping the week of July 15. Quality is excellent: sugar levels vary from 12 to 14 Brix.

Artichokes

Quality is excellent, and demand is good.

Arugula

Quality is fair. Supplies are lightening up due to irregular sizing.

Asparagus

The market is elevated. Mexican stocks remain limited due to excessive heat followed by rain. Quality is good: stalks are straight and firm, while flavor is pleasantly grassy.

Avocados

Markets are stronger on all sizes and grades from the past few weeks. Rain in the growing area's last week cleaned up the border and in some cases made sizes that were already tight, even tighter, where demand exceeds supply. Small fruit, 60's and smaller, is the tightest leading into

MARKET ALERT

- **Asparagus – ESCALATED**
- **Avocado – ESCALATED**
- **Green Beans – ESCALATED**
- **Lemons – ESCALATED**
- **Mushrooms – ESCALATED**
- **Oranges (Valencias) – ACT OF GOD**



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Produce *(continued)*

the 4th of July period and many retailers looking to promote. 48's are stronger with better demand and 40's and larger are rebounding from their lows. #2 fruit is also cleaning up and showing some strength, with most of 60's and larger hovering in the mid 20's. The next few weeks should begin transition into the newer Loca crop.

Bananas

Banana volumes are expected to be sufficient with high quality fruit coming into the market. The growing conditions are good and the predicted summer issues do not seem to be presenting themselves.

Green Beans

Green beans have been short in the East this week as crops transition to new growing areas. The eastern shore of North Carolina was hammered by a hailstorm earlier this week, which will definitely affect volume from this area. But, TN, VA and MI, all significant producers, have broken fields and should ease availability concerns within the next week or so. Western markets have limited volumes available from several California areas.

Berries:

Blackberries

The market is up. The Mexican season has ended. Stocks will remain limited until California's Oxnard and Watsonville growing regions ramp up. Quality is good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels vary from 12 to 13 Brix.



Blueberries

Prices are stable; volume is climbing in Santa Maria and Watsonville, California. Expect markets to decrease through July. Quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

The market is near the bottom; supplies are plentiful due to ideal weather. Quality is very good: berries are plump and sweet. Sugar levels range from 13 to 14 Brix.

Strawberries

Prices are rising. Demand is up for the Fourth of July holiday. Quality is good: high temperatures are causing issues such as bruising/bleeding, softness, and small size in some lots.

Bok Choy

Quality is average and demand is fair.

Broccoli

The market is low; stocks are plentiful. California quality is very good: heads are compact with deep color and firm-yet-tender texture.

Brussels Sprouts

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

Cantaloupe

Prices are low, especially for 9- and 12-count sizes. Quality is very good: sugar levels range from 13 to 14 Brix. Cantaloupe Melons are available in California.

Carrots

We are seeing both good quality and volume.

Cauliflower

Prices are weak. Cold weather stunted growth and tightened supplies, but higher temperatures are now increasing volume.

Celery

The market is near the bottom; California supplies are ample. Quality is very good: pith and growth cracking are minimal.

Cilantro

Supplies are good. Quality is fair.

Corn

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

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Produce *(continued)*

Cucumbers

Baja is still two weeks away from having “normal” cucumber volumes for this time of year and Nogales shippers are in the short rows of the season, keeping things a bit snug in the Western cucumber deal. Northwest growers are up and running with light volumes but should build to expected volumes for their regional program over the next few weeks. In the East, cucumber crops are completing the transition from Georgia to points north, such as the Carolinas, New Jersey, and Michigan. Georgia will grind to a halt this weekend, shifting the majority of orders to NJ and MI for next week.

Eggplant

This market is good through South Georgia; quality is very nice and improving daily, we should be in full production by the first of the month from the region. Out west, Nogales is quickly winding down while Coachella is experiencing perfect harvest conditions. The Central Valley is also just days away from getting started. Quality is outstanding in California.

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

The market is a bit lower this week. New crop Mexican green and red seedless grapes are on the market. Quality is very good: berries are plump and juicy.

Green Cabbage

Supplies have gotten snug in the East with Georgia finishing up and Midwest volume lighter due to a late start. Markets have ticked up this week. West coast volume and prices are mostly stable.

Red Cabbage

Markets are a bit tighter as we are still seeing lighter numbers out of the south and Michigan. Quality has been hit or miss while sizing remains good. Central coast production is good; however, with lighter volume in the East, the market has firmed up in the West.

Green Onions

The market remains firm due to reduced crossings from Mexico in the past week. We will most likely see lighter crossings the remainder of the summer, due to local deals just starting in eastern growing areas.

Honeydew

The market has eased; volume is high in both regions. Quality varies from good to very good: sugar levels range from 11 to 12 Brix. Honeydew Melons are available in California.

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

The lemon situation is extremely difficult and Demand Far Exceeds Supply across the board, the reason that we are in this situation is purely a supply issue as we are picking very few out of Dist. 2 right now and the Chilean arrivals have been minimal and will not start to see any descent Chilean volume for another 2-3 weeks. The Argentinean fruit that was supposed to arrive has had insect issues and not able to bring in, and there is word that they may not allow them to come in this year but will get more information and relay that as we get it. The little bit of Mexican fruit is just off bloom fruit so minimal volume crossing now. The Mexico volume will start

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Produce *(continued)*

to increase around the first of August but the outlook is that they are about 50% lighter than normal this season. This all paints a bleak picture and we will keep you informed on any new developments that we see as soon as we do. We will do all we can to get fruit on orders but 140's and smaller are basically nonexistent this week and probably going to be the case until we see some better Chilean volume.

Lettuce:

Butter

Demand is good, quality is average and supplies are normal.

Green and Red Leaf

Red leaf quality and demand are average and supplies are normal. Green leaf supplies are normal showing good demand and quality.

Iceberg Lettuce

Supplies are short, and quality has been very good. Market is forecasted to be lower.

Romaine

Supplies have returned to normal and demand is getting better. Quality is good with occasional fringe burn and mildew.

Romaine Hearts

Supplies have returned to normal. Demand and quality are good.

Limes

WATCH LIST - The market will be mostly stable for the next few weeks.

Napa

Supplies and demand are steady.

Onions

Onions are now in full steam out of both the San Joaquin Valley as well as New Mexico. Quality is strong at this point, and yellow supplies are in abundance. Size profiles on yellow onions have been heavy to larger sizes (Jumbos, Colossals, and Super Colossals). Mediums have commanded a premium at times as they are shorter in supply and retail outlets are stressing the market. Barring any unexpected weather, yellow onions should remain plentiful throughout the span of both California and New Mexico. Red onions in both areas have been very short, and we have seen a swift increase in price. In a typical season, California red supplies can make up for shortages in New Mexico, but due to planting delays, there have been gaps in supply out of California. Reds will likely remain elevated for much of the summer, but as California

re-enters the market with good supplies in the coming weeks, things will start to level off.

Oranges

(ACT OF GOD) - Many Valencia growers in the San Joaquin Valley were affected by extreme heat which caused post bloom conditions in our fruit. As a result, this has caused a lighter crop and there is virtually no small fruit available. At this time, our growers suggest moving to a larger size Valencia.

Parsley (Curly, Italian)

Quality is fair and supplies are good.

Green Pepper

Eastern bell pepper availability remains mostly adequate as production transitions from Georgia's older fields to newer local and regional growing areas such as NC, SC, VA, TN, KY and NJ. New crops are picking mostly XL and above, so there's not an abundance of small fruit available. However, quality looks good with minimal trouble from any given area. California's bell pepper production is also transitioning north- from Bakersfield to Stockton- with crops currently overlapping. Heat is starting to show its effects on the Bakersfield fruit, but seems to be just what the doctor ordered in Stockton. Look for quality to migrate upwards as more fruit is pulled from Stockton.

Pepper (Chiles)

With prior rain, then heat/humidity in Mainland Mexico, chili pepper quality is spotty at the moment. Baja chilies are starting to ramp up and will be at full volume in about 10 days once Central Baja gets going. Quality has been excellent with good size and shape. In California, chilies are just getting going in new areas (Stockton). Santa Maria is also slated to start around the same time as Central Baja. Quality and supply will struggle for about a week, as we transition fully into Baja and California.



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Produce *(continued)*

Red & Yellow Bell Pepper

High prices persist; California growers will experience a harvesting gap for one more week. The Mexican season has ended. Quality is average: peppers are deeply colored and subtly sweet.

Pineapple

Prices are stable; supplies are most abundant in Central America. Quality is very good: fruit is tangy and juicy. Sugar levels are high, ranging from 13 to 16 Brix.

Potatoes (Idaho)

The potato market remains strong throughout most of the size profile, especially on the larger sizes. Quality is fair with some pressure bruise and internal issues. This is largely due to the cold temperatures during the harvest of the Burbank crop. Production has also slowed as dwindling storage supplies and high cull rates are causing growers to take significantly longer to make grade. Supplies are expected to remain short until new crop Norkotahs become available around the beginning of August. Transportation has also been challenging and rates have continued to increase as we get approach the holiday.

Radishes

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

Salad Blends

The market is level; iceberg and romaine supplies are sufficient. Quality is very good: chunks and core material in finished packs are being closely monitored.

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.

Spring Mix

Prices are low; Salinas Valley supplies are ample. Quality is very good: decay and yellowing are minor issues being seen at the end of shelf-life.

Summer Squash

Squash is available in various Eastern states/growing areas

this week with the bigger volumes coming from New Jersey and Michigan. Although there are still occasional concerns with scarring on yellow squash, overall quality has been nice. In the West, Santa Maria's volume has been lighter than recent weeks but is expected to pick back up after the 4th. However, with Baja's steady production and new local deals in the Northwest, there seems to plenty of product to go around.

Tomatoes

It's transition time in the East, with lots of moving parts. Both Quincy and South Carolina are finished with crown picks and are headed for the finish line. Quincy will wrap up this week, especially since quality has started to decline rapidly. South Carolina may go into the early part of next week but will be wrap up as well. New Jersey has started in a light way and expects volumes to increase over the next 7-10 days. Tennessee, Alabama and Virginia, as well as some smaller, local deals, are on tap to get going over the next 7-14 days also. On the roma front, Tennessee farms started light harvests this week and should see volume pick up after the holiday. Grape tomatoes are also transitioning from Florida to various points north. Tomatoes are readily available in the West this week. With all the major growers in California's San Joaquin Valley running, mature green supply should be plentiful for the foreseeable future. Various Mexico areas will continue to cross vine-ripes, romas and grapes but numbers are definitely migrating to the Baja area. Overall quality has been nice on all varieties.

Tree Fruit

The market is steady; domestic stocks are sufficient. Quality is very good: nectarine and peach sugar levels range from 10 to 12 Brix, while plums vary from 12 to 16 Brix.

Watermelons

Prices are stable; supplies are adequate. Quality is very good: melons are juicy and flavor is mildly sweet. Sugar levels are inching up.

