



# MARKET TRENDS

FOR WEEK ENDING JULY 13, 2018

 **PERFORMANCE**  
FOODSERVICE





# MARKET TRENDS

JULY 13, 2018

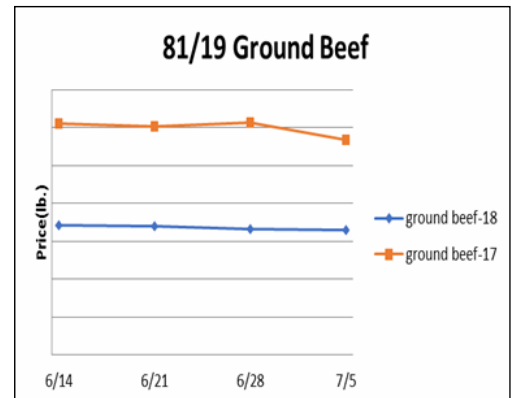
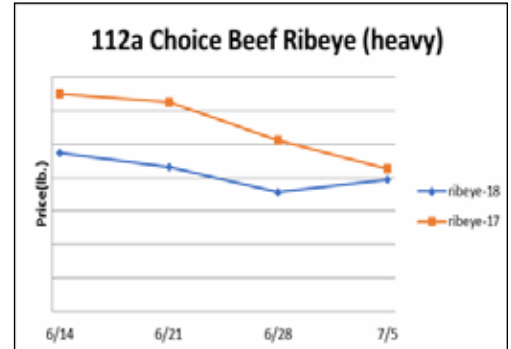
**PERFORMANCE**  
FOODSERVICE



## Beef, Veal & Lamb

Beef production last week fell 2.5% but was only .6% bigger than the same week in 2017. However, year-to-date beef output was running 3.5% better than a year ago. Abundant cattle supplies are projected to equal solid year-over-year gains in beef production during the next several months. Beef demand usually weakens after the Independence Day holiday. Most of the beef markets have seasonally peaked, and history suggests that further downside potential is possible in the nearing weeks. Last year, the loin complex declined 10% during the next three weeks. The average move for the 81/19 ground beef market during the next five weeks was lower by 6.7%.

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	Decreasing	Good	Lower
109 Export Rib (ch)	Decreasing	Good	Lower
109 Export Rib (pr)	Decreasing	Good	Lower
112a Ribeye (ch)	Increasing	Good	Lower
112a Ribeye (pr)	Decreasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Increasing	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	Higher
120a Brisket (ch)	Increasing	Good	Lower
121c Outside Skirt (ch/sel)	Increasing	Good	Lower
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Increasing	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)	Increasing	Good	Lower
184 Top Butt, boneless (ch)	Increasing	Good	Lower
184 Top Butt, boneless (pr)	Decreasing	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Lower
185c Loin, Tri-Tip (ch)	Decreasing	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	Decreasing	Good	Lower
75% Trimmings	Decreasing	Good	Lower
85% Trimmings	Decreasing	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



# MARKET TRENDS

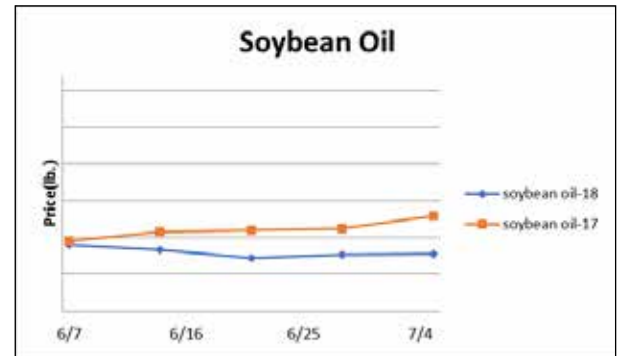
JULY 13, 2018



## Grains

The USDA recently updated their 2018 domestic oilseed and grain acreage estimates boosting acres for corn, soybeans and wheat. The available corn supply is still anticipated to tighten which could dampen the downside in corn prices for the next several weeks. Soybean and corn stocks are expected to tighten as well.

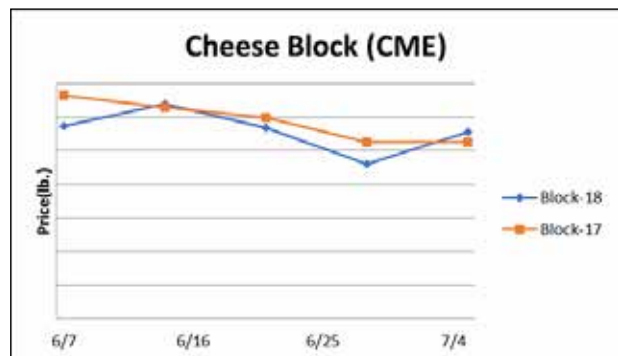
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Higher
Corn, bushel	Increasing	Good	Lower
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Lower
Distillers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



## Dairy

The cheese markets have struggled in recent weeks with cheese barrels declining to multi-year lows. Mexico recently implemented a tariff on imports of U.S. cheese and is scheduled to raise that tariff later this week. This could temper any seasonal upward moves in the cheese markets during the next several weeks. U.S. butter is also subject to various tariffs but continues to trade well below European price levels. Thus, fairly solid exports could persist which should temper any downside in the butter markets this summer. Engaging nonfat dry milk prices are likely to endure.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Higher
Cheese Blocks (CME)	Increasing	Good	Higher
American Cheese	Steady	Good	Lower
Cheddar Cheese (40 lb)	Steady	Good	Higher
Mozzarella Cheese	Steady	Good	Higher
Provolone Cheese	Steady	Good	Same
Parmesan Cheese	Steady	Good	Higher
Butter (CME)	Increasing	Good	Lower
Nonfat Dry Milk	Decreasing	Ample	Lower
Whey, Dry	Increasing	Good	Lower
Class 1 Base	Steady	Good	Lower
Class II Cream, heavy	Steady	Good	Lower
Class III Milk (CME)	Increasing	Good	Lower
Class IV Milk (CME)	Increasing	Good	Lower



# MARKET TRENDS

JULY 13, 2018

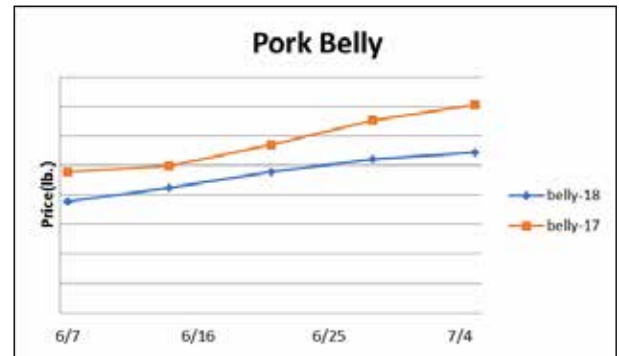
**PERFORMANCE**  
FOODSERVICE



## Pork

Pork output last week increased 2.9% and was 3.7% more than the same week last year. Hog slaughter was a three-week high. Even better pork production levels are anticipated soon. The USDA is forecasting Q3 pork output to increase from Q2 by 1.9% and to be 4.2% larger than last year. Lower pork prices are anticipated later this summer. Sparerib supplies are in better shape than a year ago. Since 2013, the average move for the sparerib market during the next four weeks was down 18.3%. The pork belly markets usually peak in late July.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Decreasing	Ample	Lower
Sow	Decreasing	Ample	Lower
Belly (bacon)	Increasing	Good	Lower
Sparerib(4.25 lb & down)	Decreasing	Good	Lower
Ham (20-23 lb)	Decreasing	Good	Lower
Ham (23-27 lb)	Decreasing	Good	Lower
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)	Increasing	Good	Lower
Picnic, untrmd	Increasing	Good	Lower
SS Picnic, smoker trm box	Increasing	Good	Lower
42% Trimmings	Increasing	Good	Higher
72% Trimmings	Decreasing	Good	Lower





# MARKET TRENDS

JULY 13, 2018

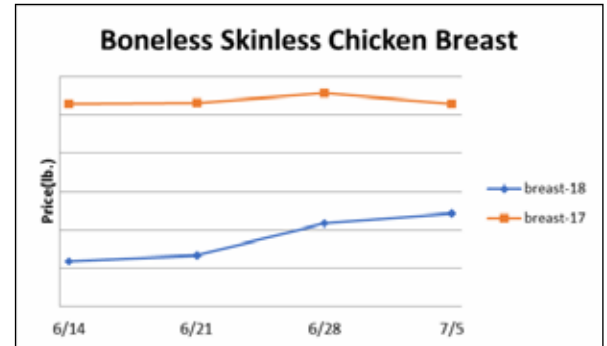
**PERFORMANCE**  
FOODSERVICE



## Poultry

Chicken production for the week ending June 23rd was up 3.4% from the prior week and was 4.2% better than the same week last year. Average bird weights were 3.3% heavier than 2017 despite the recent warm temperatures. Chicken producer margins have improved with the recent decline in feed costs. This should encourage chicken output gains in the coming weeks. The chicken wing markets have likely found a seasonal bottom with the ARA Chicken Wing Index climbing 11.2% during the last 13 business days. Still, wing prices are the lowest for this time of year since 2014, which should boost demand. Since 2013, the average move for the ARA Chicken Wing Index over the next 13 weeks was up 8.7%. Table egg prices are trending upward.

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)	Steady	Good	Lower
Legs (whole)	Decreasing	Good	Lower
Leg Quarter Index (ARA)	Increasing	Good	Lower
Thighs, Bone In	Increasing	Good	Lower
Thighs, Boneless	Increasing	Good	Lower



Description	Market Trend	Supplies	Price vs. Last Year
Whole Turkey (8-16 lb)	Steady	Good	Lower
Turkey Breast, Bnls/Sknls	Decreasing	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	Steady	Short	Higher
Liquid Egg Whites	Steady	Short	Higher
Liquid Egg Yolks	Steady	Short	Higher
Egg Breaker Stock Central	Steady	Short	Higher



# MARKET TRENDS

JULY 13, 2018

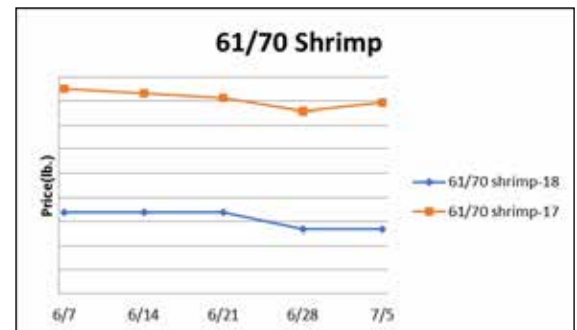
**PERFORMANCE**  
FOODSERVICE



## Seafood

The Canadian snow crab fishing season is entering its final stages with north of 85% of the Newfoundland snow crab quota landed last week. Due to the decline in both the Newfoundland and Gulf of St. Lawrence snow crab quotas this year, world snow crab supplies are expected to remain tight into 2019 which should underpin the 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

JULY 13, 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.	Steady	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	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

According to the California League of Food Processors, the June 1st U.S. tomato for processing inventory was 9.9% larger than the previous year despite last fall's harvest that was nearly 17% less than 2016. This could weigh on the canned tomato markets 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	Increasing	Short	Higher
Orange Juice lb ICE	Increasing	Good	Higher
Honey (clover) lb	Increasing	Good	Higher





# MARKET TRENDS

JULY 13, 2018

**PERFORMANCE**  
FOODSERVICE



## 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

#### Southeastern Region

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

#### 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

Mexican asparagus supplies are limited, causing prices to rise. Several consecutive days of rain in Central Mexico's growing regions have reduced availability. Although tight, Peruvian stocks are helping to meet demand.

### MARKET ALERT

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





# MARKET TRENDS

JULY 13, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce *(continued)*

### Avocados

The market is elevated. California volume is beginning to decrease. Mexican stocks are limited due to rain in the Michoacan growing region. Quality is good.

### 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

Prices are elevated. New crop California supplies are tight in Oxnard and Watsonville, but will increase as the season progresses. 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 steady; stocks are becoming more plentiful in Santa Maria and Watsonville, California. Prices should ease by next week. Quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

#### Raspberries

Prices are low; stocks are plentiful. Quality is very good: berries are plump and sweet. Sugar levels range from 13 to 14 Brix.

#### Strawberries

The market is elevated; supplies are adequate, but demand is strong. Quality is good: high temperatures are expected in California and may cause quality issues in strawberries such as bleeding, bruising, and softness.

#### Bok Choy

Quality is average and demand is fair.

### Broccoli

Prices are stable; California supplies are ample, but Mexican volume is low due to heavy rain. Domestic quality is best: 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. The San Joaquin Valley season will begin this week.

### Carrots

We are seeing both good quality and volume.



# MARKET TRENDS

JULY 13, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Cauliflower

The market is near the bottom. Ideal weather has increased domestic stocks.

### Celery

Prices have risen; California stocks are tight. Quality is very good: pith and growth cracking are minor issues.

### 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.



### 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.



# MARKET TRENDS

JULY 13, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### 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 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

The market is slightly lower than last week. Stocks are increasing; quality is improving.

### Napa

Supplies and demand are steady.



# MARKET TRENDS

JULY 13, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### 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 Bell 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.

### Red and Yellow Bell Pepper

The market is high; California growers are in the middle of a harvesting gap. Quality is good: peppers are deeply colored and subtly sweet.

### Pineapple

The market is unchanged; Costa Rican stocks are abundant. Quality is very good: fruit is tangy and juicy. Sugar levels are elevated, ranging from 13 to 16 Brix.





# MARKET TRENDS

JULY 13, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Idaho Potatoes

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 is wrapping up this week, especially since quality has started to decline rapidly. South Carolina has wrapped up this week 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

The market is steady; stocks are sufficient. Quality is very good: melons are juicy and flavor is mildly sweet. Sugar levels range from 11 to 12 Brix.

