



MARKET TRENDS

FOR WEEK ENDING JULY 27, 2018



MARKET TRENDS

JULY 27, 2018

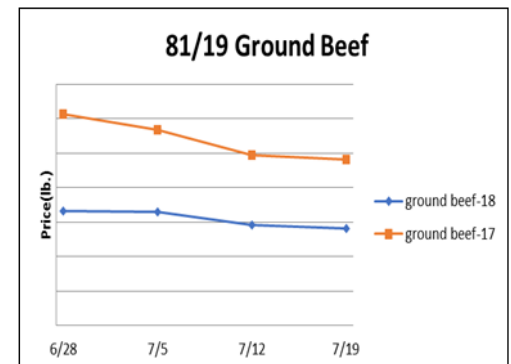
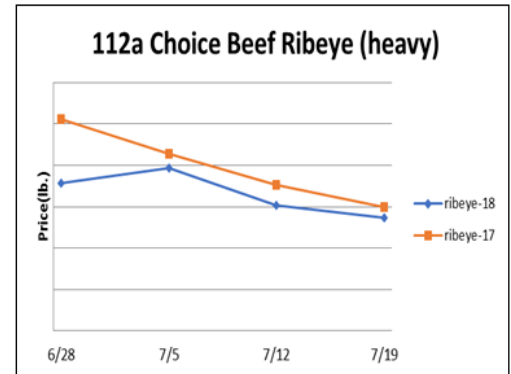
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Beef production last week rose notably from the holiday shortened previous week and was 3.9% more than the same week last year. Cattle supplies are anticipated to remain ample in the near term but could tighten in the next few months. Both domestic and foreign (export) beef demand is solid. During the last four weeks, forward beef sales were 28.8% larger than a year ago. Retail beef prices in June were up 1.1% from the previous month and were .8% higher year-over-year. Still, retailers plan to feature beef soon which may temper seasonal price declines, including ground beef. Since 2013, the average move for the domestic 90% beef trim market during the next three weeks was down 3.1%.

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	Decreasing	Good	Lower
109 Export Rib (ch)	Increasing	Good	Lower
109 Export Rib (pr)	Increasing	Good	Lower
112a Ribeye (ch)	Decreasing	Good	Lower
112a Ribeye (pr)	Increasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Increasing	Good	Higher
116 Chuck (sel)	Increasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Higher
116b Chuck Tender (ch)	Increasing	Good	Lower
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Decreasing	Good	Higher
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)	Steady	Good	Lower
169 Top Round (ch)	Decreasing	Good	Lower
171b Outside Round (ch)	Decreasing	Good	Lower
174 Short Loin (ch 0x1)	Decreasing	Good	Higher
174 Short Loin (pr 2x3)	Decreasing	Good	Lower
180 0x1 Strip (ch)	Decreasing	Good	Higher
180 0x1 Strip (pr)	Decreasing	Good	Lower
184 Top Butt, boneless (ch)	Increasing	Good	Lower
184 Top Butt, boneless (pr)	Steady	Good	Higher
184-3 Top Butt, bnls (ch)	Decreasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Higher
185c Loin, Tri-Tip (ch)	Decreasing	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	Lower
193 Flank Steak (ch)	Decreasing	Good	Higher
50% Trimmings	Increasing	Good	Lower
65% Trimmings	Increasing	Good	Lower
75% Trimmings	Steady	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



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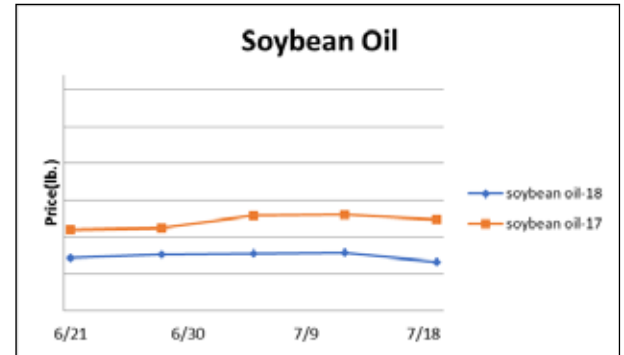
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Grains

The grain markets have mostly been on the defensive as of late with soybean prices declining to nine-year plus lows. Trade challenges continue and don't look to be rectified in the near-term which should temper the upside in prices. That said, the grain markets are due for an upward correction.

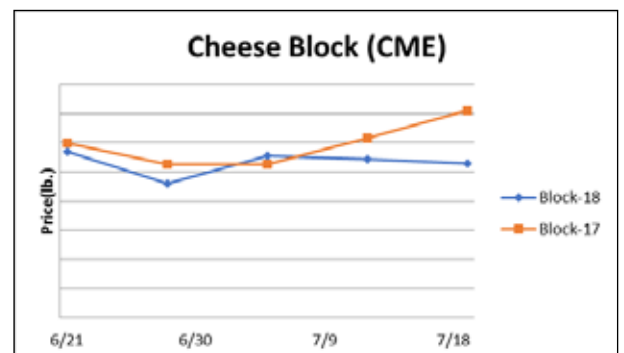
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Higher
Corn, bushel	Increasing	Good	Lower
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Lower
Distillers Grain, Dry	Decreasing	Good	Higher
Crude Palm Oil, lb BMD	Decreasing	Good	Lower
HRW Wheat, bushel	Decreasing	Good	Higher
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 remain range-bound. U.S. cheese output was 1.4% better than 2017 during May, and Class III milk price premiums over Class IV should encourage cheese production moving forward. This factor, tempered exports due to trade challenges, and building world output are likely to mitigate any seasonal cheese price increases this summer. It's a similar story for the butter and nonfat dry milk markets. June 1st, U.S. nonfat dry milk stocks were 3.1% less than last year and the lowest for any month since the spring of 2017. Still, the current inventory is historically large.

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



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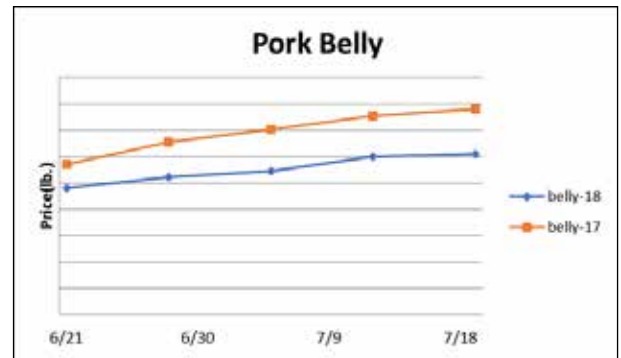
PERFORMANCE
FOODSERVICE



Pork

Pork output last week rose notably from the holiday shortened prior week and was 4.7% bigger than 2017. Hog supplies will seasonally expand in the coming months. The USDA is forecasting July through December pork production to be 5.6% larger than last year. Look for the pork markets to experience downward pressure. In June, retail bacon prices were down 7.4% from the prior year which encouraged demand. But, wholesale belly prices will peak soon. The five-year average move for the pork belly cutout during the next eight weeks is lower by 26.8%.

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)	Increasing	Good	Lower
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	Lower
Tenderloin (1.25 lb)	Decreasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Decreasing	Good	Lower
Picnic, untrmd	Decreasing	Good	Lower
SS Picnic, smoker trm box	Decreasing	Good	Lower
42% Trimmings	Decreasing	Good	Lower
72% Trimmings	Decreasing	Good	Lower



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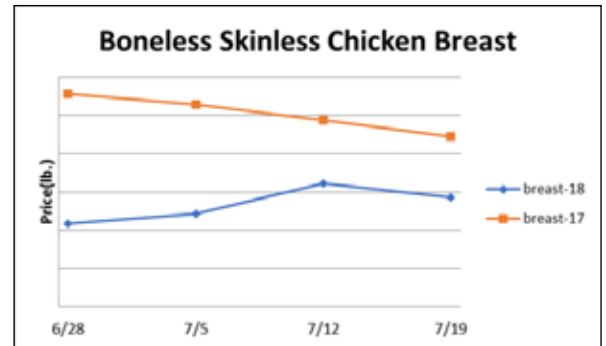
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Poultry

Chicken production for the week ending July 7th fell notably from the previous week due to the holiday and was .4% smaller than the same week last year. Currently, year-to-date chicken output is tracking only slightly better than 2017. But, production is forecasted to trend 2.1% above year ago levels for the second half of this year. The chicken wing markets are the cheapest for this time of year since 2014. Anticipate strong feature activity for bone-in wings as football season nears which will likely influence prices higher. Over the last five years, the average price of the ARA chicken wing index during August, September and October was 4.2% higher compared to July. Chicken breasts prices are usually choppy during August but soft in September.

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



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



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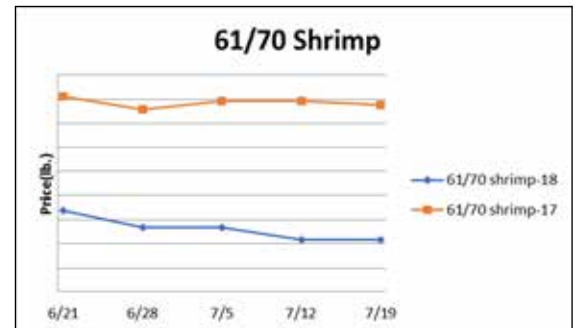
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Seafood

World snow crab supplies remain limited. This is impacting U.S. import volume and prices. During May, the U.S. imported 3% less snow crab than the previous year at an average price north of \$8 lb.- a record high. Due to the smaller Canadian and U.S. harvest totals, world snow crab supplies are likely to remain tight into 2019, underpinning prices.

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	Higher
Tilapia Filet, frz	Steady	Good	Higher
Cod Filet, frz	Steady	Good	Higher
Tuna Yellowfin, frsh	Steady	Good	Higher
Salmon Atlantic Filet, frsh	Steady	Good	Higher
Pollock Filet, Alaska, frz	Steady	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	Jun-18	May-18	Apr-18
Beef and Veal	Increasing	Decreasing	Increasing
Dairy	Increasing	Decreasing	Decreasing
Pork	Decreasing	Decreasing	Decreasing
Chicken	Increasing	Decreasing	Increasing
Fresh Fish and Seafood	Increasing	Decreasing	Increasing
Fresh Fruits and Vegetables	Decreasing	Increasing	Increasing

Various Markets

Coffee prices continue to track at engaging levels for buyers. World coffee supplies are adequate and the deflated Brazilian real continues to weigh on the markets. That said, coffee prices have not traded appreciably below a \$1 lb. since October 2004.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Steady	Good	Higher
Tomato Paste-Industrial (lb)	Steady	Good	Same
Coffee lb ICE	Decreasing	Good	Lower
Sugar lb ICE	Decreasing	Ample	Lower
Cocoa mt ICE	Decreasing	Short	Higher
Orange Juice lb ICE	Increasing	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 - are a mess--Demand far exceeding supply on all sizes fancy and choice. Market is extremely strong. Also there has been an "ACT OF GOD" placed on Lemons! Imports are very slow to arrive so this is causing even more issues on supply.

Watch List

Avocado

Though July is expected to remain 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 peach 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

The market is level. Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are on the market. Sugar levels range from 14 to 18 Brix.

Pear prices are steady. Washington D'Anjou Pears are no longer on the market, but new crop California Bartletts have begun shipping. Red D'Anjous and Argentine stocks are also available. Quality is excellent: sugar levels vary from 12 to 14 Brix.

Artichokes

Quality is excellent, and demand is good.

Arugula

Quality is excellent, and demand is good.

Asparagus

Prices have eased. The domestic season has ended, but imported supplies are ample in both growing regions. Quality is good: spears are straight, tips are closed, and flavor is subtly grassy.

MARKET ALERT

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



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Produce (continued)

Avocados

Not much has changed. 48s and larger continue to bog the market down. Smaller fruit continues to stay tight. Once the industry moves through the current bubble of fruit that is out there, things could change quickly. Loca is not expected to have as much size as the current crop and will be much cleaner as well. Already there is less #2 fruit in the market, but there is enough big fruit, that the #1 fruit might start substituting #2 fruit. California had extreme heat in growing areas and a few of the areas were not expecting it. This could possibly force CA to finish earlier than they expected to, some ranches are experiencing fruit dropping from trees, due to the heat. Peru fruit is on the way and should hit by sometime next week, bringing in more 48's and larger, to a market that is already saturated with those sizes.

Bananas

This week there was a reduction in volume based upon poor weather in the tropics. This has caused no major issues in the market since demand is down as well as next week. Weather will be correlated to another reduction in total supplies but again this should cause no major impact since market demand is still down.

Beans (WA, CA, NC, VA, TN, MI)

EAST: With a few areas gapping, beans are fairly fragmented keeping prices high. Quality is a mostly good, but we have heard some trouble reports due to weather conditions.
WEST: Supply continues to be limited and sporadic. Unfortunately quality is now questionable as well. Thus prices move up for decent product.

Berries:

Blackberries

Prices are starting to ease. New crop California supplies are increasing 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 steady; volume is rising in Santa Maria and Watsonville. Domestic quality is very good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

California prices are low; summer supplies are plentiful. Quality is very good: berries are plump and sweet. Sugar levels range from 13 to 14 Brix.

Strawberries

Expect high markets, limited availability, and quality issues through July. Elevated temperatures in Santa Maria and Watsonville have impacted supplies and quality. Bleeding, bruising, and softness are issues.

Bok Choy

Quality is average and demand is fair.

Broccoli

Prices are low. California supplies are ample; Mexican stocks are increasing. Quality is very good: heads are compact with deep color and firm-yet-tender texture, but flowering is a slight issue.

Brussels Sprouts

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

Cantaloupe

Market wide spread due to quality, we are going with good volumes out of the Westside and overall quality is very good. We are peaking on 9's and jumbo 9's and the smaller fruit is a little tougher to come by. We will be getting into some better supplies of the smaller fruit in the coming weeks.

Carrots

We are seeing both good quality and volume.



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Produce (continued)

Cauliflower

The market is low; domestic supplies are abundant. Quality is excellent: heads are snowy white and firm.

Celery

High prices persist; California stocks are tight. Quality is very good: pith and growth cracking are minor issues.

Cilantro

Supplies are light due to quality.

Corn

Good volume continues to become available on yellow and white product out of the San Joaquin Valley corn market (yellow, white and bi-color). Good supplies are also available out of Carolinas, Indiana and Illinois.

Cucumbers (KY, MI, NC, NJ, OH, SC, VA, WA, Mexico)

EAST: Market activity remains in the east, with high markets expected for another ~7 days. Light volumes from MI, NJ, & KY are keeping markets hot. FOBs are up. Quality is mostly good, but some areas that have experienced high temps are seeing heat related issues.

WEST: Hot temps and an abundance of supply are causing growers to walk from fields. FOBs are starting to rise, however there is still good quality and supply available.



Eggplant

EAST: Georgia and North Carolina are the major players with solid numbers available. Quality is nice and FOBs remain low. WEST: Hot temps and an abundance of supply are causing growers to walk from fields. FOBs are starting to rise, however there is still good quality and supply available.

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

Market is steady as we are finished with Mexico and Coachella Valley and have started in the Central Valley which will take us through December. The crop here in the central valley is looking very good as we have a good set and the fruit is fairly consistent in size. We are expecting to have good quality fruit through the year barring any major weather situations, and the estimated volume is about 114 million packed cartons.

Green Cabbage

Supplies are improving with supplies ramping up throughout the Midwest (Georgia is now done). Sizing is still smaller with larger product availability slowly improving. West coast volume and prices are mostly stable.

Red Cabbage

Markets are a bit tighter as lighter numbers are still coming out of Ohio. 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

Iced - The market remains sluggish due to crossings from New Mexico and plenty of local home grown in eastern growing areas. Iceless - The market is good and should remain steady.

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Produce (continued)

Honeydew

Market is steady with good supplies of 5's, 6's and 8's on the Westside and overall quality is very nice and sugars are very good as well. We will be going through mid-October on the Westside.

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

They are a mess--Demand far exceeding supply on all sizes fancy and choice. Market is extremely strong, D2 is not producing enough fruit and we are running into gaps in supply also due to the extreme heat that hit the central coast and Los Angeles region. D2 will see generally good quality however will see some more wind scarring and possible snail damage on the coastal fruit as well as soft fruit due to the heat. Argentine has not been a factor to ease any supply situation for the imports due to an insect issue and we may not see any volume from them due to this situation, we will keep you posted as we learn more. Chilean is very slow in getting to us; with the global market conditions growers in Chile are sending more fruit to other parts of the world than the U.S. at this point. We are expecting the Chilean supply will get better and more consistent later part of July or first of August, but that remains to be seen. Mexican imports should start in the next few weeks also but expect to see a lighter crop by about 40% due to past weather conditions. We expect a very strong market throughout the summer months, and into September.

Lettuce:

Butter

Supplies are lighter than normal. Demand is good and quality is average.

Green and Red Leaf

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

Iceberg Lettuce

Supplies are slightly lower and demand is up slightly. The market will be a little more active going into the weekend. Quality is nice.

Romaine

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

Romaine Hearts

Supplies are normal. Demand and quality are good.

Limes

The market is inching up. Rain and hot weather in Mexico are causing quality problems and shortening shelf-life; growers must cull more fruit than normal.

Napa

Supplies and demand are steady.

Onions

Weather has help boost the market on yellows for the second consecutive week. It looks like the red and white markets have settle down to a steady trading level as supplies improve. Washington State will start their transplant onions at the end of this week. We will also see some direct seed onions starting in the next two weeks. Idaho/Oregon is ramping up for an early start this year. We expect to start packing new crop ID/OR onions on August 15th.



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Produce (continued)

Oranges

The market is very strong across the board; Valencia's are starting to peak on mid sizes so we are seeing fewer of the small ones. It is also a lighter crop so we will be fighting supplies of fruit through the remainder of the summer until we start navels around the first of November. The overall quality of the Valencia's is good with descent color some green tinge which is normal for Valencia's and fruit is not near as firm as a navels, juice and sugar content is very good. The bloom for next year's navel 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. Please be aware that we are in a Heat Wave that could last up to 3-weeks (101-108), you will see green color on the Valencia's, and also keep in mind that this fruit is about 16 months old on the tree, and the trees are also carrying next year's crop which puts lots of stress on the tree especially when our weather is hot and that is when we see re-greening and softer fruit.

Parsley(Curly, Italian)

Quality is fair and supplies are good.

Green Bell Pepper (NC, KY, SC, VA, NJ, MI, CA, GA)

EAST: Supply remains steady out east, with good volume available from many regions. FOBs are unchanged and quality is excellent.

WEST: As the transition winds down, quality is starting to slowly improve. FOBs are steady with Baja bringing a good mix to market.

Jalapenos (Chiles) (GA, NC, KY, VA, TN, CA, MX)

EAST: Many local programs have begun, providing great supply to the region. FOBs are steady with great quality available.

WEST: CA & MX are both going through a transition period, with sourcing fragmented and quality sporadic. This transition is winding down, so look for things to improve over the next 7 days. FOBs are easing off slightly as Baja begins with better quality.

Red Bell Pepper (Canada, Mexico)

WEST: Production is steady which means FOBs are mostly steady as well. Quality is excellent.

Pineapple

The market for small sizes is inching up; Costa Rican volume is high. Quality is very good: fruit is tangy and juicy. Sugar levels are elevated, ranging from 13 to 16 Brix.

Idaho Potatoes

We don't expect to see any upward movement in this Idaho market as sheds close in on the end of the 17/18 season. The sizes with opportunity continue to be the 90's and 100's. New crop is right around the corner, about 4-5 weeks. Some shippers will start new Idaho reds and yellow potatoes on August 15th.

Radishes

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

Salad Blends

Prices are unchanged; volume is up. Quality is very good: chunks and core material are being closely monitored by our inspector to reduce problems in finished packs.

Snow and Sugar Snap Peas

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

Spinach (Bunched)

Supplies and quality are fair due to wind burn and heat damage.

Spinach (Baby)

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



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Produce (continued)

Spring Mix

The market is weak; Salinas Valley supplies are plentiful. Quality is very good: incidences of decay and yellowing are being seen throughout the industry at the end of shelf-life.

Yellow Squash/Zucchini (CA, GA, KY, MI, NC, NJ, PA, SC, TN, TX, VA, WA, Mexico)

EAST: Although the growing regions are very fragmented, there is still plenty of squash to go around. FOBs are steady. Quality continues to be nice from all regions.

WEST: Santa Maria is seeing great quality with steady pricing. Southern Cal is higher than Santa Maria, with good quality also available.

TOMATOES (EAST)

Rounds

There are a few local farms still going in the Georgia and South Carolina regions, however most of the eastern volume is coming from Virginia, Tennessee, North Carolina, Alabama, & New Jersey. FOBs have moved down slightly on most sizes, mostly driven by the low western market. However, freight rates are so high, you have to pose the question, is there really a savings to buy cheap out west? The crop is starting to lean more heavy on the extra-large size, with large and mediums being a bit snug. Quality & volumes from all regions is particularly nice right now.

Romas

Most Roma volume is coming from the Tennessee area with some Alabama fruit as well. FOBs remain unchanged moving into next week. Quality is particularly nice.

Grapes

As previously reported, we are moving through a small transition from South Carolina to Virginia. FOBs are creeping up slightly, but not as much as originally anticipated. There is decent volume and good quality available.

Cherries

No changes to report. Prices are steady with good solid supplies harvesting in Virginia. Quality is excellent.

TOMATOES (WEST)

Rounds

Ample supply is available from the west, pushing market prices to unreasonably low FOBs. However, some of the "too good to be true" deals are showing major quality concerns so buyer beware! Temperatures continue to be 100+ degrees which is impacting quality. Most CA tomatoes are soft, full red and have a very short shelf life. **We highly recommend keeping a very tight inventory.*

Romas

There is [finally] a little excitement up in the Roma world out west. Jumbo & extra-large sizes have gotten a hair tighter, driving FOBs up. Large is FOB's are up while medium is actually the most available, down slightly. There is still plenty of supply around with good quality available from numerous growing regions.

Grapes

FOBs move slightly up as growers move fields. However, Baja is still providing a good supply, enough to meet demand. Prices are up just a few dollars with good quality available.

Cherries

Baja is harvesting a steady amount of cherries to meet market demand. Prices are steady with good quality available.

Tree Fruit

Prices are level; California 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 has eased; supplies are abundant. Quality is very good: melons are juicy and flavor is mildly sweet. Sugar levels vary from 11 to 12 Brix.

