



# MARKET TRENDS

FOR WEEK ENDING AUGUST 17, 2018



# MARKET TRENDS

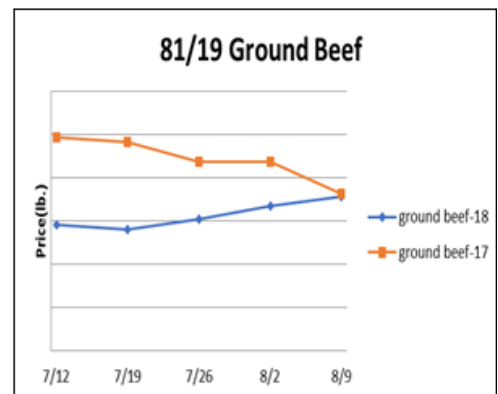
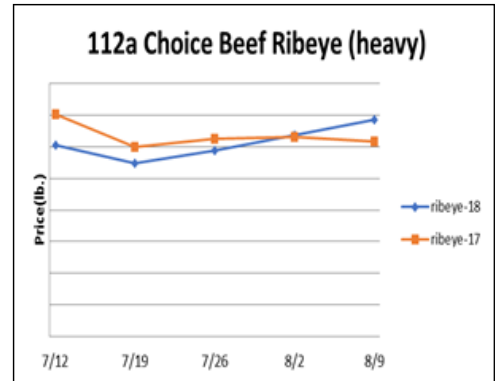
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## Beef, Veal & Lamb

Beef production last week was down 2% from the prior week and was 1.4% smaller than the same week last year. The July 1st total U.S. cattle herd was up 1% from 2017 and was the biggest since 2008. Yet, it was the smallest annual gain since 2014. Beef output for the second half of 2018 is expected to be 3.5% more than last year. Seasonal beef price gains this fall should be modest. Dry conditions in the southern plains are boosting cow slaughter. A drought is occurring in Australia which is fueling cow kill there also. This could boost lean beef trimming supplies in the near term. Since 2013, the average move for 90% beef trim prices in September and October was down 11.1%.

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



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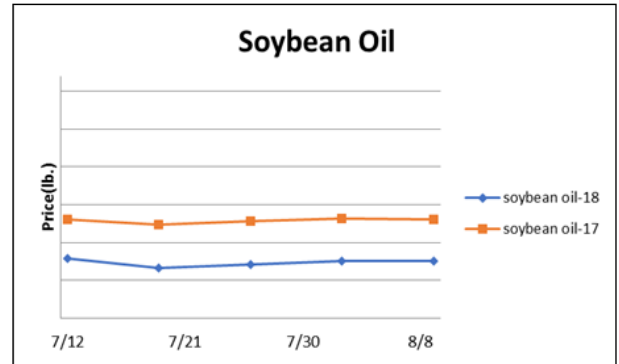
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## Grains

The wheat markets have continued to firm during the last week. The U.S. winter wheat harvest is in its final stages with 90% complete as of August 5th. However, world supply expectations are tightening due to challenging weather in Europe and Australia. This could support wheat prices in the near term.

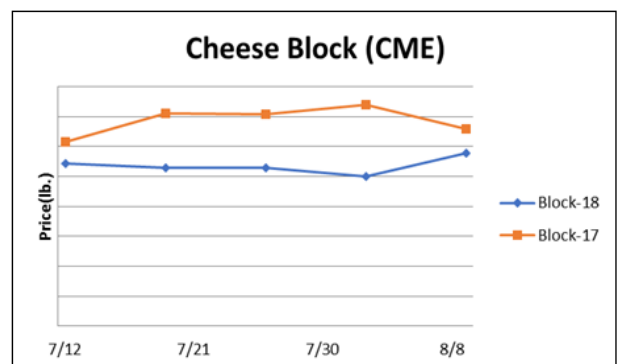
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Steady	Good	Lower
Soybean Meal, ton	Decreasing	Good	Higher
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Higher
Distillers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



## Dairy

U.S. milk production continues to trend above year ago levels. During June, milk output was 1.2% larger than the previous year due to 1.2% rise in milk per cow yields and a slightly lower milk cow herd. Milk farmers kept the milk cow herd unchanged from the previous month. The milk cow herd remains historically large but may continue to modestly decline in the coming months due to subpar margins for farmers. Seasonally fading milk output is supporting cheese prices. But, U.S. cheese supplies are ample which could temper any further seasonal price increases this summer.

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



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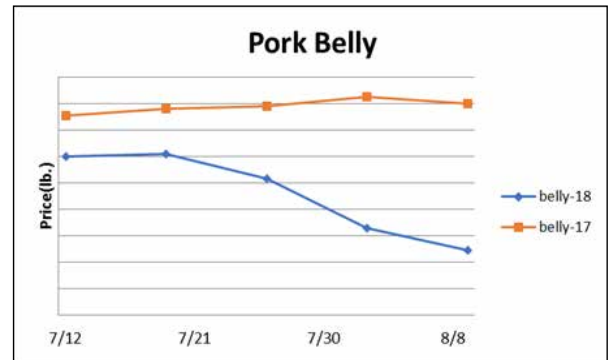
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## Pork

Pork output last week rose 16.6% and was 3.8% bigger than the same week last year. Seasonally rising hogs are likely to encourage pork production gains in the coming months. Pork output from July through December is forecasted to be 5.6% more than last year. Lower pork prices are expected through the Labor Day week. U.S. pork exports during June were 1.4% more than the previous year but the smallest since September. Exports to Mexico during the month were 3.8% less than 2017, and exports to China-Hong Kong were down 40.5%(y-o-y).

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Decreasing	Ample	Lower
Sow	Decreasing	Ample	Lower
Belly (bacon)	Decreasing	Good	Lower
Sparerib(4.25 lb & down)	Increasing	Good	Higher
Ham (20-23 lb)	Increasing	Good	Lower
Ham (23-27 lb)	Increasing	Good	Lower
Loin (bone in)	Increasing	Good	Lower
Babyback Rib (1.75 lb & up)	Increasing	Good	Higher
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	Increasing	Good	Lower



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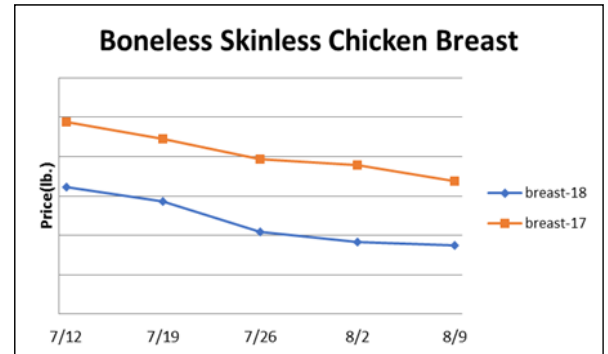
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## Poultry

Chicken production for the six-week period ending July 28th rose 1.3% from the prior year. During those same six-weeks, chicken slaughter averaged 1% more than 2017, and the average bird weight was heavier by .3%. The USDA is calling fall chicken output to be 2.1% better than last year. The chicken breast markets are at their least expensive levels for this time of year in 18 years. Still, chicken breast demand is expected to pick up and prices should appreciate moving towards the Labor Day holiday. However, history suggests that lower chicken breast prices will materialize thereafter. The chicken wing markets are the cheapest for this time of year since 2011. Wing prices are projected to firm into September with growing demand from football viewers.

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)	Decreasing	Good	Lower
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)	Steady	Short	Higher
Medium Eggs (dozen)	Increasing	Short	Higher
Liquid Whole Eggs	Decreasing	Short	Higher
Liquid Egg Whites	Decreasing	Short	Higher
Liquid Egg Yolks	Steady	Short	Higher
Egg Breaker Stock Central	Steady	Short	Higher



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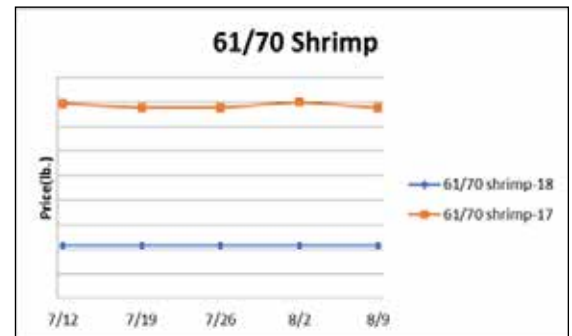
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## Seafood

The Canadian snow crab fishing season is practically finished. As of August 5th, 97% of the Newfoundland snow crab quota had been landed. Sharply lower Newfoundland and Gulf of St. Lawrence quotas compared to previous years is causing supplies to remain tight. This factor is anticipated to support the snow crab leg markets during the next several months.

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)	Decreasing	Good	Lower
Snow Crab, frz	Increasing	Good	Higher
Tilapia Filet, frz	Decreasing	Good	Higher
Cod Filet, frz	Decreasing	Good	Higher
Tuna Yellowfin, frsh	Increasing	Good	Higher
Salmon Atlantic Filet, frsh	Decreasing	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
<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	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 have continued to track at historically low levels. The Brazilian real value has firmed against the U.S. dollar in recent weeks. The inability for coffee prices to firm as well speaks to the adequate world supplies. Still, the greater price risk for coffee from here is to the upside.

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	Increasing	Ample	Higher
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

Eastern crops have had an abundance of rainfall over the last month with more in the forecast. Dry veg is very sensitive to showers and temperatures. We highly recommend keeping a very tight inventory until the rain ends.

Most commodities are steady. Valencias are still in an ACT OF GOD with higher prices and shortages in supply. Lemons are also in an ACT OF GOD. Avocados are also EXTREME. Romaine commodities are steady.

### MARKET ALERT

- Avocados- EXTREME
- Lemons - ACT OF GOD
- Mushrooms - ESCALATED
- Oranges (Valencias) - ACT OF GOD

### Watch List

#### Limes

The market is increasing in price due to the new crop being behind. The quality on limes is very poor, and supplies are tight.

#### Green Beans

The bean deal out the East remains firm due to weather-related quality issues. West coast supplies are hit or miss as ongoing heat-related issues are impacting production. Some supplies are crossing through McAllen; however, they are hit or miss on the actual arrival dates. Pricing continues to rise while quality remains fair at best. We are not expecting relief until mid-August.

### Apples & Pears

Prices are level. Storage crop Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are available. Sugar levels range from 14 to 18 Brix.

The Pear market is unchanged. New crop California Bartletts are available; the crop is dominated by small sizes. Washington Bartletts will be on the market next week, followed by D'Anjous in early September.

### Artichokes

Quality is excellent, and demand is good.

### Arugula

Quality and supplies are fair.

### Asparagus

Prices are unchanged; stocks are abundant. Quality is average: spears are straight, tips are closed, and flavor is subtly grassy.

### Avocados

Prices are up. California supplies are diminishing. Mexican stocks are limited; growers are shipping their summer/Flora Loca crop. Quality is average: oil content is high.





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## Produce (continued)

### Bananas

Demand on this item remains firm; however, prices will continue to ease. Quality will remain inconsistent due to weather that has impacted the growing regions in Guatemala, Mexico, and Costa Rica.

### Beans

EAST: Supply is still very tight in the east. Some fields are gapping, some are experiencing heavy rains, and some have very poor quality. Look for prices to remain high and supply tight until Mother Nature decides to play nice in the sandbox. WEST: Supply is still very tight in the west. However, new blocks are expected to start in the next week, giving much needed relief to the country. FOBs for next week are expected to remain higher until volume ramps up. Quality is mostly good, with some limited heat related issues.

### Berries:

#### Blackberries

The market is average. California volume is adequate. 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 level; supplies are increasing in Santa Maria and Watsonville, California. Domestic quality is very good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

#### Raspberries

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

#### Strawberries

Prices are stable; expect high volume through September. Hot weather is increasing volume, yet causing quality problems in some lots. Cold-chain management remains a vital component of maximizing shelf-life.

#### Bok Choy

Quality is average, and demand is fair.

#### Broccoli

Expect stronger broccoli markets. Supplies will increase next week, causing prices to stabilize. Some Salinas Valley growers have experienced gaps in planting schedules, creating a subtle disruption in supplies. Overall quality is very good. Heads are compact with deep color and firm-yet-tender texture; discoloration is an occasional issue in Mexican stocks.

### Brussels Sprouts

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

### Cantaloupe

Market is a bit soft on the Jumbo 9's and 9's and getting a bit stronger on the smaller fruit 12's and 15's, we are going with good volumes out of the Westside and overall quality is very good, most of the varieties a ESL Harper they are very strong but sugar is only fair. 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.

### Cauliflower

Prices are weak; stocks are ample. California quality is excellent: heads are snowy white and firm.

### Celery

The market is near the bottom; supplies are abundant. Quality is very good: pith and growth cracking are minor issues.

### Cilantro

Supplies are light due to quality.



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## Produce (continued)

### 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. Good time to promote, quality is excellent.

### Cucumbers

EAST: As MI's volume increases, there are plenty of cukes available. Quality has improved as well, keeping low pressure on FOBs.

WEST: A little bit of a mixed bag out west. Supply is readily available, but quality varies by field. FOBs are steady.

### Eggplant

EAST: Supply has tightened up, however, there are still local programs available. FOBs are perking upward.

WEST: Fresno still pushes light volume with good quality. FOBs are high, but steady. Improvement is expected in the next 10-14 days.

### 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 picking throughout 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 continue to improve throughout the Midwest. 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.

### 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 now is the time to start pushing California melons.

### 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

Good supplies available on Chilean product.

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## Produce (continued)

### Lemons

**They are a mess--Demand far exceeding supply on all sizes fancy and choice.** MMarket 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 in the next 2-weeks, but that remains to be seen. Mexican imports have started in a light way, 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 normal, and demand and quality are both good.

#### 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 continue to be lighter. Demand is up slightly and quality has been very good.

#### Romaine

Supplies are slightly above normal. Demand is average, and quality is good with occasional light fringe burn.

#### Romaine Hearts

Supplies are slightly above normal. Demand and quality are both good.

### Limes

Prices are climbing due to tighter supplies reduced by wet weather and increased demand. When product arrives into South Texas, breakdown, decay, stilar, and yellowing are more prevalent than normal. Ordering for quick turns is recommended.

### Napa

Supplies and demand are steady.

### Onions

Some shippers Idaho/Oregon onions have begun. Right now most growers are only shipping yellows onions out of there. Reds will be added in about a week and whites will follow a week after that. New Mexico is still shipping and should be in full production at least until 8/17 at which time production will slow. That deal should be totally wrapped up by the end of August.

### Oranges

Market very strong across the board, Valencia's are starting to peak on mid sizes so we are seeing fewer of the small ones demand exceeds supply on 138's and 113's will be soon to follow. It is also a lighter crop so we will be fighting supplies of fruit through the remained of the summer until we start navels around the first of November. The overall quality of the Valencia's is good to fair with descent color some green tinge which is normal for Valencia's and fruit is not near as firm as a navels and a fair amount of stem end breakdown, 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 still in a Heat Wave that has been going for over 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, stem end aging or skin breakdown. The Valencia's are pretty rough and will only get rougher as we navigate through the summer, hoping to start navels earlier than the first of November.



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## Produce (continued)

### Parsley(Curly, Italian)

Quality is fair and supplies are good.

### Green Bell Pepper

EAST: With bad weather in the local regions, supply is not as readily available as expected. Thus, FOBs remain fairly firm into next week. Quality varies by region, but is mostly fair to good.

WEST: Northern CA region pepper volume is plentiful. Prices are steady as most growers are harvesting at full steam. Quality is mostly good, but some areas are showing heat related injury.

### Jalapenos (Chiles) CA, KY, NC, PA, TN, VA, MX

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

WEST: FOBs move down and stabilize out as MX, Baja & CA are all producing good volume and decent quality.

### Red and Yellow Bell Pepper

Prices are unchanged. California stocks are ample; medium and choice peppers dominate the crop. Quality is very good: peppers are deeply colored and subtly sweet.

### Pineapple

Prices are slightly above average; Costa Rican stocks are starting to diminish. Quality is very good: fruit is tangy and juicy. Sugar levels range from 13 to 16 Brix.

### Idaho Potatoes

Most of the old Burbanks are going fast and should be completely wrapped up in the next week or so. The New crop norks are being packed at most shippers locations. Supply is VERY good and product needs to move, will have to wait and see if this market holds. Don't be surprised if prices fall off a little next week.

### Radishes

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

### Salad Blends

The market is level; iceberg and romaine stocks are ample. Quality is very good: Inspectors are closely monitoring pack-outs for chunks and core material to reduce potential problems before shipment.

### 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.

### Spring Mix

Prices are weak; Salinas Valley stocks are plentiful. Quality is very good: decay and yellowing are occasional issues near the end of product shelf-life.

### Yellow Squash/Zucchini CA, KY, MI, NC, NJ, OR, PA, SC, TN, TX, VA, WA, Mexico

EAST: With growing regions all over the country, there is ample yellow squash available. FOBs are steady with quality mostly good, however, some scarring is present. Zucchini has become a bit snug with FOBs driving upward. Quality is fair to good.

WEST: FOBs are flat as there is plenty of squash to go around. However, quality is still only fair at best



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## Produce (continued)

### TOMATOES (EAST)

#### Rounds

It has been quite the wet summer out east, with more rain in the forecast. Fortunately, yields have been steady, but harvest days can be cut short with the showers. Still, plenty of local supplies lingering around. Volume will begin to taper off over the upcoming weeks. For now though, the west has had plenty of supply, helping to keep eastern demand slow and steady. Thus, FOBs are unshaken moving into next week. Rain will continue to determine market prices as growers dig into new fields. Quality has been mostly excellent; however, some fruit is softer to the touch than usual.

#### Romas

Lackluster demand is putting pressure on Roma's to move. Although plantings are fairly light, and weather taking its toll on yields, FOBs have balanced out. Look for XL to remain steady, with LG & MD sizes moving downward. Quality remains is mostly good.

#### Grapes

Still in active market, but with light demand, grape prices are still lingering at a higher than usual mark, however are expected to stay firm into next week. Quality is mostly excellent; however, some slips from the heavy rains are showing every so often.

#### Cherries

Supply is a bit short as we head through this week. Rain being the driving force and also a little push on demand with grapes being at a steady high market. FOBs are fairly steady, some quoting higher for next week. While product overall looks nice, firmness & shelf life seem to be affected the most.

### TOMATOES (WEST)

#### Rounds

Quotes seem to be all over the place, which is driven mostly by quality. Higher quality is demanding higher price points. Those low prices may not make the 4+ day truck ride to your location. Mature green FOBs are [mostly] steady; however, some shippers are trying to get higher FOB's if their quality is there. MX vines, especially smaller sizes, are still snug with steady FOBs. Quality on both mature greens & vine ripens is mostly good, but bear in mind these do feel softer to the touch. Temperatures are still 100+ degrees as well. We recommend keeping a tighter than usual inventory.

#### Romas

Volume is still limited from both Baja & Oceanside. Sizing is becoming the major issue with Jumbo & XL being the tightest, large is limited, and mediums and smalls more readily available. Thus FOBs have shifted with the supply yields, putting downward pressure on the large, medium and smalls. Quality is fair with most fruit very soft and red. We recommend keeping a tighter inventory.

#### Grapes

Baja & Nogales are producing lighter yields, but supply is slowing starting to pick up. FOBs are moving down a few dollars. Quality has slightly improved, but is still only fair to good.

#### Cherries

Quality from MX is still poor to fair, forcing most to shift their purchasing to the CA market. However, CA has a bit better supply, thus FOBs are moving down.

#### Tree Fruit

The nectarine, peach, and plum markets are stable; supplies 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 steady at low levels; stocks are abundant in most growing regions. Quality is very good: melons are juicy and flavor is mildly sweet. Sugar levels range from 11 to 12 Brix.

