



MARKET TRENDS

FOR WEEK ENDING AUGUST 31, 2018



MARKET TRENDS

AUGUST 31, 2018

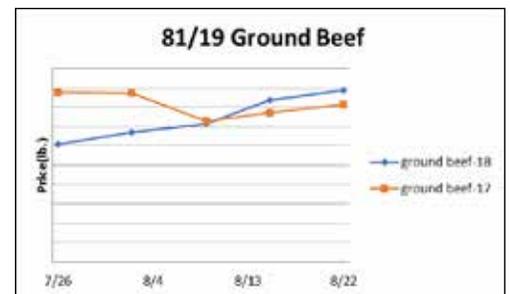
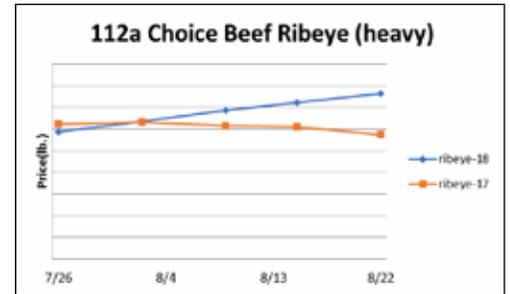
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Beef production last week rose 2.8% and was 3% larger than the same week last year. Cattle slaughter was a 10 -week high. Beef packer margins are in good shape for this time of the year which should encourage output in the near term. There may be a brief supply gap next month however due in part to some erratic cattle placements earlier this year. This could temper seasonal price declines for beef. Beef demand has been solid. The choice ribeye market has risen 13.1% over the last five weeks. Still, look for the beef markets to seasonally decline after Labor Day. Since 2013, the average move for the choice ribeye market during the first three weeks in September was down 6%.

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



MARKET TRENDS

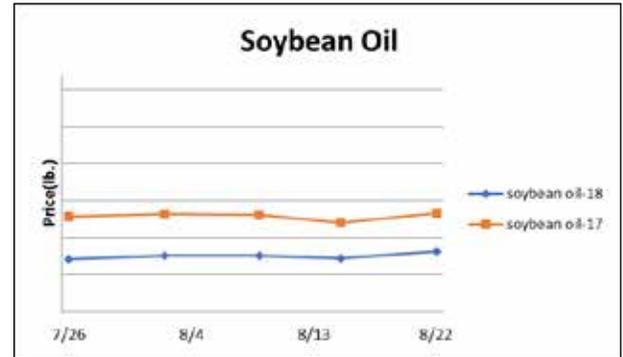
AUGUST 31, 2018



Grains

The U.S. winter wheat harvest has ended while the spring wheat harvest persists. As of August 19th, 60% of the spring wheat crop had been harvested. Concerns remain around the potential of the world's largest exporter, Russia, curbing exports. This may underpin wheat prices during the next several weeks.

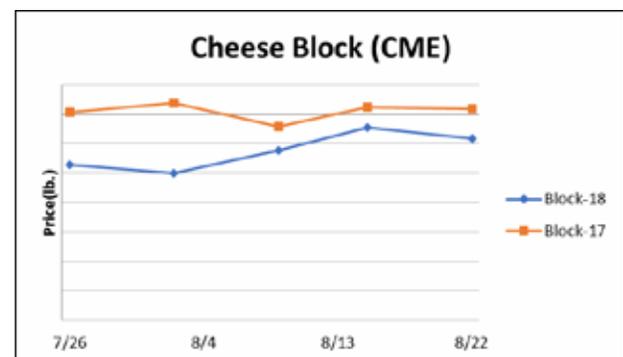
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Higher
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Steady	Good	Higher
Distillers Grain, Dry	Increasing	Good	Higher
Crude Palm Oil, lb BMD	Increasing	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	Increasing	Good	Lower
Rice, Long Grain, lb	Steady	Good	Higher



Dairy

Milk production growth slowed during July. For the U.S., milk output during the month was just .4% larger than last year due to a .5% gain in milk per cow yields and a .1% smaller milk cow herd. Milk farmers reduced the herd by a net 8,000 head in July marking the biggest one-month reduction since the winter of 2016. The herd is now the smallest since the spring of 2017 but is still historically large. Earlier this year, the U.S. milk cow herd was the biggest since 1996. Slowed milk output growth could be somewhat supportive of the cheese and butter markets during the next few months.

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



MARKET TRENDS

AUGUST 31, 2018

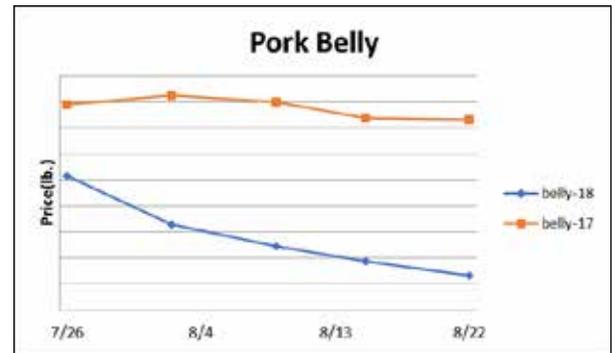
PERFORMANCE
FOODSERVICE



Pork

Pork production last week was up 5.5% and was 5.1% better than the same week a year ago. Hog slaughter was the largest for any week since December. Abundant hogs are likely to translate to big year-over-year gains in pork output this fall. Expect pork prices to seasonally weaken in the coming months. The African swine fever has emerged in China in three different areas. China is the world's largest pork producer and consumer. If this problem persists, it may boost U.S. pork demand and support prices. Belly prices are the lowest since May 2015.

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)	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)	Increasing	Good	Lower
Tenderloin (1.25 lb)	Decreasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Increasing	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



MARKET TRENDS

AUGUST 31, 2018

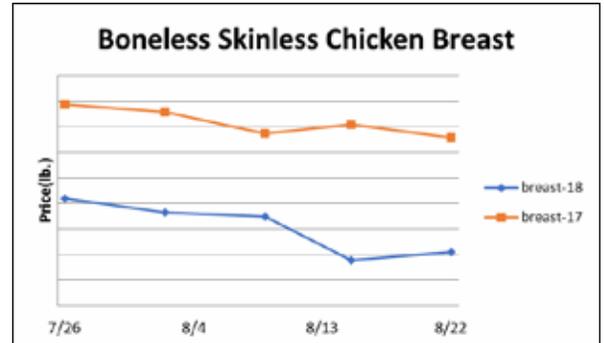
PERFORMANCE
FOODSERVICE



Poultry

Chicken output for the six-week period ending August 11th grew 1.7% from 2017. Expectations are for solid chicken output growth versus 2017 this fall. The USDA is projecting Q4 chicken production to be 2.2% better than 2017. Last week, chicken producer margins were the lowest for the week since 2012. Chicken demand is in question. Last week, the ARA Chicken Breast Index and ARA Chicken Tender Index were both the lowest since January. The ARA Leg Quarter Index was the cheapest since February 2017. Finally, the ARA Chicken Wing Index is the lowest for this time of year since 2011. But, the football season begins next week which will fuel wing demand. Since 2013, the average move for the ARA Wing Index in September was up 5.8%.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Decreasing	Good	Lower
Wings (jumbo cut)	Decreasing	Good	Lower
Wing Index (ARA)	Increasing	Good	Lower
Breast, Bnless Skinless NE	Increasing	Good	Lower
Breast, Bnless Skinless SE	Decreasing	Good	Lower
Breast Boneless Index (ARA)	Increasing	Good	Lower
Tenderloin Index (ARA)	Steady	Good	Lower
Legs (whole)	Decreasing	Good	Lower
Leg Quarter Index (ARA)	Decreasing	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)	Increasing	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	Increasing	Short	Higher
Liquid Egg Whites	Decreasing	Short	Higher
Liquid Egg Yolks	Increasing	Short	Higher
Egg Breaker Stock Central	Steady	Short	Higher



MARKET TRENDS

AUGUST 31, 2018

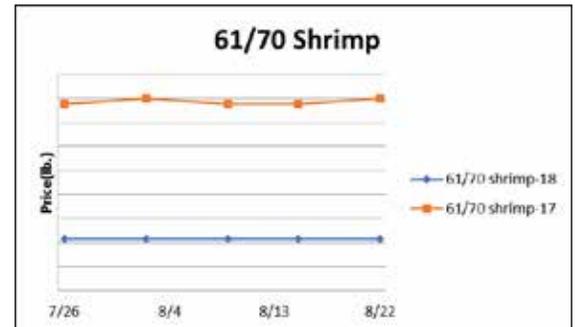
PERFORMANCE
FOODSERVICE



Seafood

The snow crab markets remain inflated due to the tight world supply which is impacting imports. During June, the U.S. imported 6.9% less snow crab than the previous year. The 2018-19 Alaskan snow crab harvest quota is likely to be historically small. This factor and the small Canadian quotas are expected to support snow crab prices into next year.

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



MARKET TRENDS

AUGUST 31, 2018

PERFORMANCE
FOODSERVICE



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	Jul-18	Jun-18	May-18
Beef and Veal	Increasing	Increasing	Decreasing
Dairy	Decreasing	Increasing	Decreasing
Pork	Increasing	Decreasing	Decreasing
Chicken	Increasing	Increasing	Decreasing
Fresh Fish and Seafood	Decreasing	Increasing	Decreasing
Fresh Fruits and Vegetables	Increasing	Decreasing	Increasing

Various Markets

The coffee markets continue to soften. This week the nearby Arabica coffee futures market declined to its lowest level in over 11 years. A weak value of the Brazilian real continues to put a negative bias over coffee prices. The downside risk in coffee from here may be 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	Decreasing	Good	Lower
Sugar lb ICE	Decreasing	Ample	Higher
Cocoa mt ICE	Increasing	Short	Higher
Orange Juice lb ICE	Decreasing	Good	Higher
Honey (clover) lb	Steady	Good	Higher



MARKET TRENDS

AUGUST 31, 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 are also in an ACT OF GOD, but Romaine commodities remain good buys.

Watch List

Avocados

Markets are easing back as inventories begin to improve and relieve pressure on the markets. Sizing is still mixed and shorter on the smaller grades. We expect this condition to continue through the first week of October. This is due to a shorter than expected startup of the Flora Loca crop combined with a very short California season. We ask that you continue to be flexible on sizes and origins where possible and will need to sub to Peruvian fruit as soon as possible to ensure order fulfillment until we are clear of any potential interruptions.

Limes

The market is improving, prices seem to be dropping, and quality is fair.

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

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

The Pear market is level. New crop Washington Bartlett Pears are on the market; small sizes dominate the crop. New crop D'Anjous will be available in early September. Overall quality is excellent: sugar levels range from 12 to 14 Brix.

Artichokes

Quality is excellent, and demand is good.

Arugula

Quality and supplies are fair.

Asparagus

Expect the market to rise for the next ten days. Fields in Central Mexico are past peak production, while Baja yields are slowly increasing. Limited Peruvian stocks are helping to meet demand. Quality is good.

MARKET ALERT

- Cilantro – EXTREME
- Green Onions – EXTREME
- Lemons – ACT OF GOD
- Mushrooms – ESCALATED
- Oranges (Valencias) – ACT OF GOD



MARKET TRENDS

AUGUST 31, 2018

PERFORMANCE
FOODSERVICE



Produce (continued)

Avocados

Prices will remain elevated until Mexico's fall crop begins in mid-September. The California season is ending early due to high temperatures. Supplies are tight, particularly No. 2 grade fruit. Quality is average: oil content is low in Mexican fruit at this time of year.

Bananas

Banana volumes are expected to be sufficient with high quality fruit coming into the market. The growing conditions are good as the anticipation of the 2018-19 school year is upon us.

Beans

EAST: Despite some price relief, beans are still very tight in the east due to rain & quality. Prices have come down slightly in the past week, however are still firm. Until weather stabilizes and gives the plants an opportunity to improve quality, expect pricing fluctuations.

WEST: Still light coverage in the west with limited fields going. FOBs are still high with no promotable supplies available. Quality is poor mostly due to heat.

Berries:

Blackberries

The market has eased slightly; California stocks are sufficient. The Mexican season should start next week, easing demand. Quality is very good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels vary from 12 to 13 Brix.

Blueberries

Prices have stabilized. Supplies are most plentiful in California; expect volume to continue increasing. Domestic quality is best: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

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

Strawberries

Expect prices to start rising this week and the next due to strong Labor Day demand; Santa Maria and Watsonville supplies are abundant. Cold-chain management is a vital component of maximizing shelf-life through the hot summer and early fall months.

Bok Choy

Quality is average, and demand is fair.

Broccoli

The market has eased; expect abundant supplies for the next two weeks. Overall quality is very good. Heads are compact with deep color and firm-yet-tender texture; hollow core and pin rot are occasional problems due to heat.

Brussels Sprouts

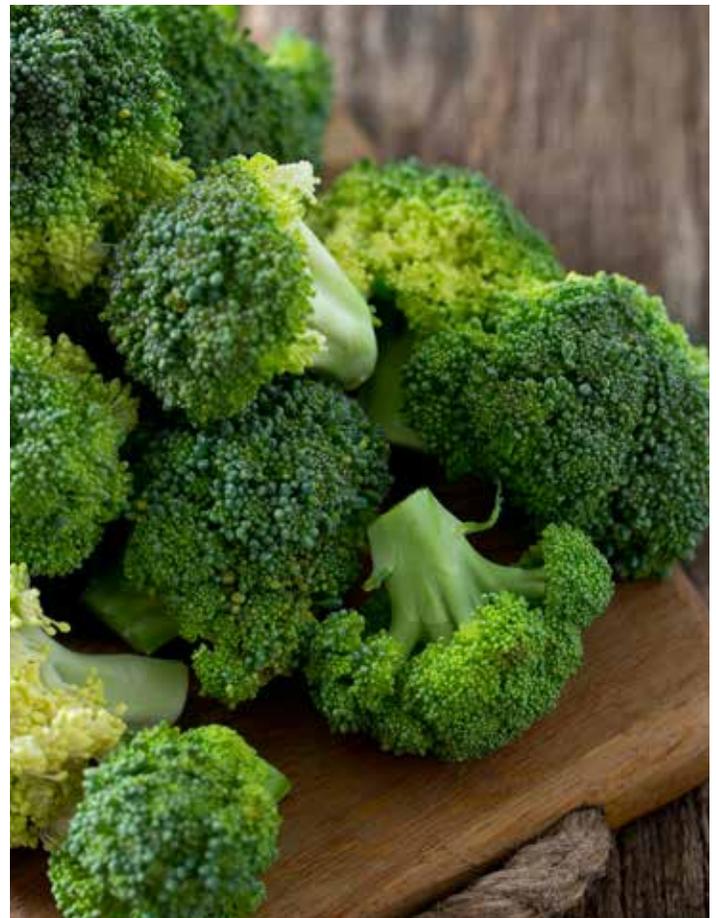
Supplies are light, and quality is good. Prices are steady.

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.



MARKET TRENDS

AUGUST 31, 2018

PERFORMANCE
FOODSERVICE



Produce (continued)

Cauliflower

Prices are weak; stocks are ample. California quality is very good: heads are snowy white, but bruising is an occasional issue.

Celery

The market is low; supplies are plentiful. Quality is very good: pith and growth cracking are minor issues.

Cilantro

EXTREME Supplies are light due to poor 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

EAST: A bit active, but mostly readily available, cucumbers look to be in good supply for the next week. FOBs are fairly steady. Quality reports however have been a bit scattered and vary by shipper. Some fields are producing great quality, and some are very poor.

WEST: Supply is a bit snug in the west, so some demand, especially in the Midwest, is turning to the east. However, with the mixed quality reports in the east, this is putting pressure on the west. Thus, FOBs are up significantly and continue to rise. Expect very active markets through early September.



Eggplant

EAST: Supplies are light mostly due to rainfall. FOBs are strengthening some. Quality is fair to good.

WEST: Supplies are light as most growers are in field gaps. FOBs are feeling a little upward pressure. Quality is fair to good.

Fennel

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

Garlic

The market is about 50% done with the 2017 crop. Supplies are steady and prices remain high on domestic product.

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, but the market remains firm. Sizing is still smaller with larger product availability slowly improving. West Coast volume and prices are mostly stable.

Red Cabbage

Supplies continue to improve throughout the Midwest, but the market remains firm. Sizing is still smaller with larger product availability slowly improving. West Coast volume and prices are mostly stable.

Green Onions

EXTREME Iced - The market is extremely active due to reduced volumes from Mexico because of the heat and humidity for the past six weeks. Iceless - Like the iced market, the iceless market is very active due to the lighter supplies from Mexico attributed to high heat and humidity for the past six weeks.

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

MARKET TRENDS

AUGUST 31, 2018

PERFORMANCE
FOODSERVICE



Produce *(continued)*

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.

Lemons

Market is still very strong and is trying to adjust as we are seeing a few more Chilean arrive and also seeing a bit more Mexican fruit crossing but has been lighter than expected this week keeping the demand exceeds on choice fruit, our Dist. 2 domestic volume is still light and will continue to be so due to the drop we had from the extreme hot weather in the region. We also need to keep in mind that the Mexican volume is about 40-50% lighter than normal. The Chilean will continue to arrive through the month and then will start to slow down on volume into September. We will get started around the third week of September and this year's crop is also a little lighter than normal. The overall quality of the lemons is good to fair; you will see some heavier scarring and some green tinge on fruit depending where the fruit is coming from. We expect the market to stay strong, but supplies are a little better than they have been for the last 2 months, and the pipeline has been empty but should start to get it filled but will take a while.

Lettuce:

Butter

Supplies are normal, and demand and quality are both good.

Green and Red Leaf

Red leaf quality is good, supplies are normal, and demand is average. Green leaf supplies are normal with good quality and demand has been average.

Iceberg Lettuce

Supplies continue to be lighter. The market has been very active and prices are high with good quality.

Romaine

Supplies are slightly below normal, demand is strong, and quality is good with occasional light fringe burn.

Romaine Hearts

Supplies are slightly below normal; however, demand and quality are both good.

Limes

Prices are starting to inch down. New crop fruit is being harvested; the crop is dominated by small sizes. Quality is good: fruit is juicy and tart.

Napa

Supplies and demand are steady.

Onions

Onions are in full harvest just like potatoes. Unlike potatoes the Treasure Valley will probably start pulling some of their storage product by mid-September as harvest will continue into October. Markets have been holding steady. Quality is really nice, we are even seeing some nice bronze shells coming out of some fields, this is a bit unusual. Excellent size this year, should be plenty of jumbos and larger. There wasn't any serious weather issues this year in the Treasure Valley so we shouldn't see any storage quality issues.



MARKET TRENDS

AUGUST 31, 2018

PERFORMANCE
FOODSERVICE



Produce (continued)

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 and this will be the case as we go forward through the Valencia season. 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 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. We will be subbing some Chilean navels when possible to cover the 113's and 138's on orders just a heads up, if you do not want navels please let us know. 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.

Parsley(Curly, Italian)

Quality is fair and supplies are good.

Green Bell Pepper

EAST: Great availability on all sizes across the board. FOBs are mostly steady with good quality available.
WEST: Great availability on all sizes across the board. FOBs are pushing downward. Quality is mostly good, but some areas are showing heat related injury.

Jalapenos (Chiles)

EAST: Supply remains steady out east, with good volume available. FOBs are unchanged and quality is excellent.
WEST: FOBs have stabilized, and even moved down, as MX, Baja & CA are all producing great volume and great quality.

Red and Yellow Bell Pepper

WEST: Supply has lightened up, pushing FOBs up significantly. Additionally, quality has declined and is only fair at best. Most issues are in the form of shrivel with early signs of light stem decay.

Pineapple

Prices are up. Expect limited stocks over the next two weeks; large sizes are especially tight. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

Harvest is in full swing and we have potatoes. There is plenty of availability on all sizes. Market is down as expected this week and most expect it will fall again as shed push to move volume. Quality has been very nice, excellent size and shape with a very good skin set.

Radishes

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

Salad Blends

The market is steady; iceberg and romaine stocks are adequate. Quality is very good: Inspectors continue to closely monitor 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.



MARKET TRENDS

AUGUST 31, 2018

PERFORMANCE
FOODSERVICE



Produce (continued)

Spring Mix

Prices are up; stocks are limited. Recent warm weather has accelerated growth and caused brittle texture. Some finished packs are exhibiting elevated mechanical damage. Shelf-life performance maybe impacted.

Yellow Squash/Zucchini

EAST: Supply is still very tight with a very active market. Prices are feeling quite a bit of pressure to stay high. Quality is mostly good, with yellow showing heavy scarring once again.

WEST: Supply is light, but steady. FOBs remain fairly unchanged into next week; however, quality has significantly dropped off. Expect quality, especially yellow, to be fair at best.

TOMATOES (EAST)

Rounds

Tomato supply continues to tighten with light supplies and increased rainfall. Only a handful of growers are harvesting right now, with most being in the middle of a transition period. More growers will start back up in September, but volume is not expected to be significant. FOBs are firmly up across the board for next week. Surprisingly, even with the weather, quality has not been impacted too much. The fruit is shaping up nicely.

Romas

Demand and supply both remain light, but equally steady. FOBs are steady for next week and quality is mostly good.

Grapes

Downward pressure on FOBs for grapes is evident as more supply becomes available. Prices will fall a small amount as we move forward into next week. Quality is still a bit of a challenge, with rain and heat being the major factors. We recommend keeping a tight inventory.

Cherries

Things remain mostly unchanged for cherries. Look for FOBs to remain stable. Quality is still a little unstable. We recommend keeping a tight inventory.

TOMATOES (WEST/MEXICO)

Rounds

Not only is western demand firm, but demand from the east as strengthened as well. With light supplies in the east, many are trying to fill the void from the west, despite freight rates. FOBs are moving upward again for next week. There are a few shippers with lower prices, however, quality from them can be questionable. Quality is mostly good, but bear in mind these are the "typical California tomatoes". They typically have a short shelf life and feel very soft to the touch. We recommend keeping a tighter than usual inventory.

Romas

Supplies are snug in both CA & MX. California has very weak quality, putting pressure on MX to fill the pipeline. However, San Diego is running tight, therefore keeping firm pressure on FOBs. Prices will remain about the same for next week, but could start to rise within the next 10-14 days. Quality is fair at best with most fruit feeling soft. We recommend keeping a tighter than usual inventory.

Grapes

Demand & supply has been mostly steady week to week. FOBs are expected to remain the same moving into next week. Quality is good to excellent.

Cherries

Supplies remain snug, yet steady. FOBs will remain unchanged as we move into next week. Quality is mostly good, but some shippers are showing light color.

Tree Fruit

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

Watermelons

Prices are unchanged; stocks are ample in most growing regions. Quality is very good: melons are juicy and flavor is mildly sweet. Sugar levels range from 11 to 12 Brix.

