



MARKET TRENDS

FOR WEEK ENDING SEPTEMBER 21, 2018



MARKET TRENDS

SEPTEMBER 21, 2018

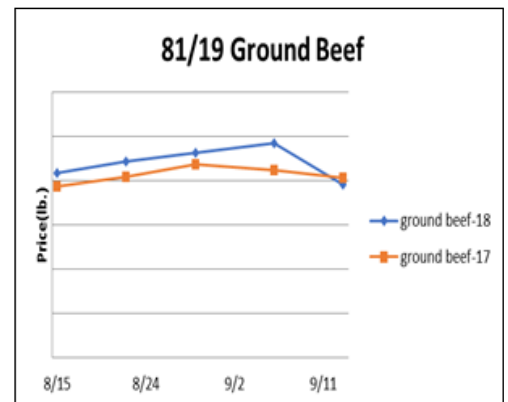
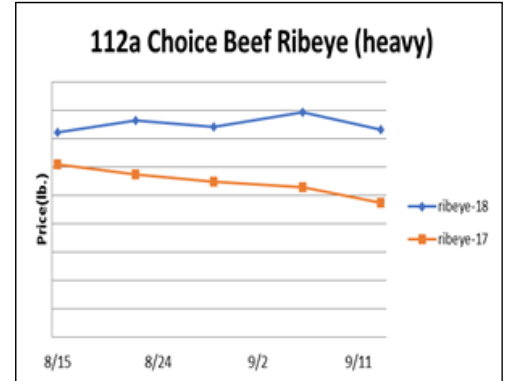
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Beef output last week fell 11.6% due to the Labor Day holiday and was 1.6% smaller than last year. The USDA boxed beef cut-out is pricing 7.6% higher than a year ago. Beef demand domestic and abroad is solid. Despite a firm greenback, beef exports during July were up 17.2% from 2017 and a record for any month. July beef imports were down 2% from the prior year but were the second best for the month since 2007. History suggests that seasonal price weakness will occur for several beef items, including ground beef and end cuts. Since 2013, the average move for the 81/19 ground beef market over the next three weeks was down 9.5%. And, the choice 0x1 steak cut averages 8.5% lower.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Increasing	Short	Higher
Ground Beef 81/19	Decreasing	Good	Lower
Ground Chuck	Decreasing	Good	Lower
109 Export Rib (ch)	Decreasing	Good	Higher
109 Export Rib (pr)	Increasing	Good	Lower
112a Ribeye (ch)	Decreasing	Good	Higher
112a Ribeye (pr)	Increasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Decreasing	Good	Higher
116 Chuck (sel)	Decreasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Lower
116b Chuck Tender (ch)	Decreasing	Good	Lower
120 Brisket (ch)	Decreasing	Good	Higher
120a Brisket (ch)	Decreasing	Good	Higher
121c Outside Skirt (ch/sel)	Increasing	Good	Higher
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Decreasing	Good	Higher
167a Knuckle, Trimmed (ch)	Increasing	Good	Lower
168 Inside Round (ch)	Decreasing	Good	Higher
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)	Decreasing	Good	Lower
180 0x1 Strip (ch)	Increasing	Good	Higher
180 0x1 Strip (pr)	Increasing	Good	Lower
184 Top Butt, boneless (ch)	Decreasing	Good	Lower
184 Top Butt, boneless (pr)	Decreasing	Good	Lower
184-3 Top Butt, bnls (ch)	Decreasing	Good	Higher
185a Sirloin Flap (ch)	Decreasing	Good	Higher
185c Loin, Tri-Tip (ch)	Increasing	Good	Lower
189a Tender (sel, 5 lb & up)	Decreasing	Good	Lower
189a Tender (ch, 5 lb & up)	Increasing	Good	Lower
189a Tender (pr, heavy)	Increasing	Good	Lower
193 Flank Steak (ch)	Decreasing	Good	Higher
50% Trimmings	Decreasing	Good	Higher
65% Trimmings	Decreasing	Good	Higher
75% Trimmings	Steady	Good	Lower
85% Trimmings	Increasing	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)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Higher



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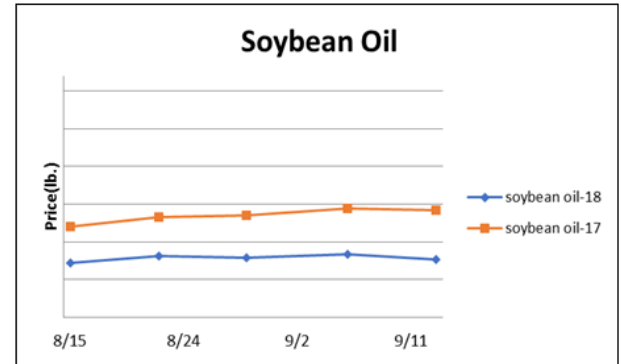
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Grains

Russia has been heavily exporting wheat in recent weeks. Part of this is due to concerns that the Russian government could set restrictions on wheat exports later this fall due to the limited world supply. If this does occur, it could bring notable wheat export business to the U.S. which would be supportive of prices.

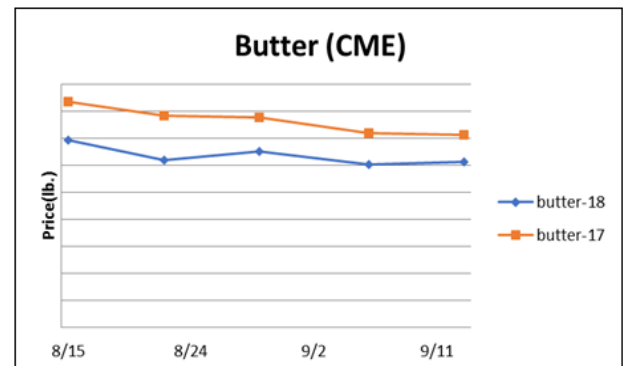
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher
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	Increasing	Short	Lower
Pinto Beans, lb	Increasing	Good	Lower
Black Beans, lb	Steady	Good	Lower
Rice, Long Grain, lb	Decreasing	Good	Higher



Dairy

U.S. cheese production in July was 3.7% larger than last year. Cheese exports during the month were up just 1.5% compared to the 2017 but were the second biggest for the month on record. World cheese prices have softened which is dampening forward export demand. This could temper any upside risk in the cheese markets in the near term. U.S. butter output in July was just .5% bigger than the previous year. But, due to strong imports and ample carryover stocks, the available U.S. butter supply in July was 5.8% larger than a year ago. Butter price inflation may be tempered as well.

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



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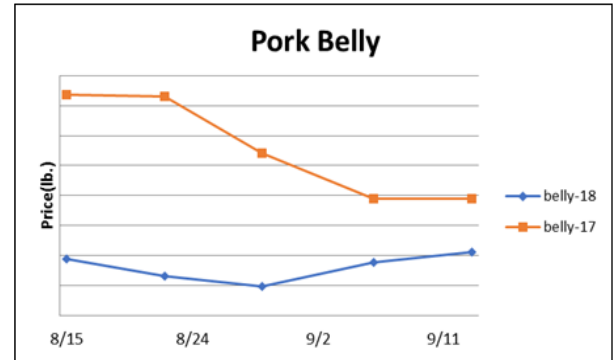
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Pork

Pork production last week dropped 9.7% due to the holiday and was .6% smaller than last year. Pork output this week is being limited by some pork processing operations closing in anticipation of Hurricane Florence. Still, the USDA is calling Q4 pork production to be 6.3% larger than 2017. This should help the seasonal price declines for pork that occur during the fall. But, if China's African swine fever outbreak worsens, it could tighten hog supplies and support U.S. pork exports. The pork belly primal has risen in the last two weeks but is still below a \$1/lb.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Increasing	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)	Increasing	Good	Lower
Babyback Rib (1.75 lb & up)	Decreasing	Good	Lower
Tenderloin (1.25 lb)	Decreasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Increasing	Good	Higher
Picnic, untrmd	Increasing	Good	Lower
SS Picnic, smoker trm box	Increasing	Good	Lower
42% Trimmings	Decreasing	Good	Lower
72% Trimmings	Decreasing	Good	Lower



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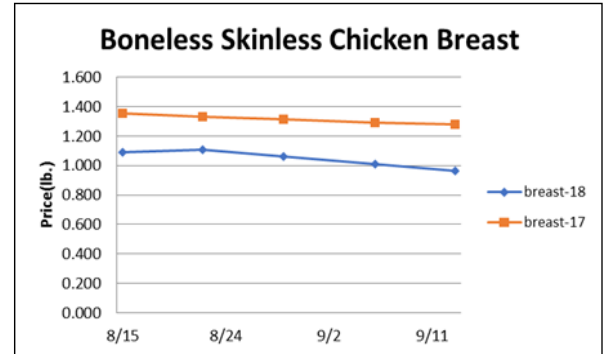
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Poultry

Chicken output for the week ending September 1st was up 2.7% from the prior week, was 5.6% bigger than last year and a record. Chicken production for the six-week period ending September 1st was 2.2% better than 2017. Reasonable feed costs for chicken producers are projected to encourage chicken output. The USDA is calling Q4 production to be up 2.2% from 2017. Last week, the ARA Chicken Breast Index was the lowest since April 2006. Value, when measured against other proteins may temper seasonal price declines for chicken breasts this fall. The ARA Chicken Wing Index has risen 4.2% over the last week which isn't unusual in September. Wing prices can remain firm into October. July chicken exports were 4.6% better than the previous year.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Increasing	Good	Lower
Wings (jumbo cut)	Steady	Good	Lower
Wing Index (ARA)	Increasing	Good	Lower
Breast, Bnless Skinless NE	Decreasing	Good	Lower
Breast, Bnless Skinless SE	Increasing	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	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	Increasing	Good	Higher

Eggs

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



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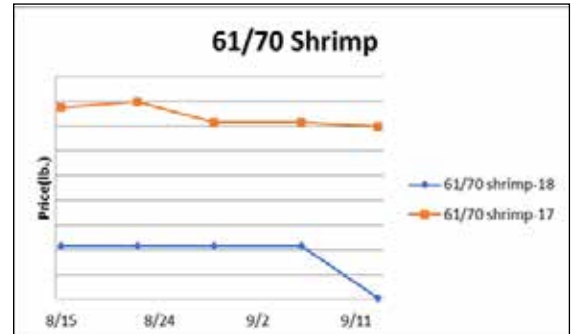
PERFORMANCE
FOODSERVICE



Seafood

World snow crab supplies remain limited. U.S. snow crab imports in July were basically double what they were the previous year but at sharply higher price levels. The Alaskan snow crab fishing season will commence this fall. However, expectations are that the Alaskan quota will remain historically small. Elevated snow crab prices are likely to persist.

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	Decreasing	Good	Higher
Tilapia Filet, frz	Decreasing	Good	Lower
Cod Filet, frz	Increasing	Good	Higher
Tuna Yellowfin, frsh	Steady	Good	Higher
Salmon Atlantic Filet, frsh	Decreasing	Good	Lower
Pollock Filet, Alaska, frz	Increasing	Good	Higher



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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	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 California and Midwest tomato for processing harvests are progressing. In California, weekly tonnage has likely peaked, but the harvest will persist into October. Due to smaller carryover stocks, the 2018-19 tomato for processing supply should tighten which could support prices.

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



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Produce

Market Overview

Most commodities are steady. Valencias and lemons are still in an ACT OF GOD with higher prices and shortages in supply. Most West Coast veg items are steady.

Apples

Shippers will continue to have storage supply of the major varieties of apples through the remainder of summer, and most have finished packing all varieties. The quality, condition, and color on almost all varieties look very good. New crop gold varieties and galas are starting up this week, followed by Fuji in two weeks. Granny and Red Varieties are projected to ramp up the first week of September followed by pinks in October.

Pears

New crop Bartlett pears have started with good supply available especially on the larger (70's to 100's) sizes. Expect to see new crop Bosc and D 'Anjou start first week of September.

Artichokes

Quality is excellent, and demand is good.

Arugula

Quality and supplies have improved and product is available.

Asparagus

There is still a slight shortage on larger sizes, as well as higher prices on the larger-sized product, but expect to see improvement next week. All other sizes remain steady.

Avocados

Markets continue to ease 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. Due to the lower markets, the growers in Mexico are scaling back production to stabilize the freefall. Outlook for September remains volatile. October should return to normal supply barring no weather events or unrest.

Bananas

Banana volumes are expected to be sufficient with high quality fruit coming into the market. The conditions should continue to be great as no real issues with production are predicted.

Beans

EAST: A weak market in the east has plenty of beans available. FOBs are low and good quality is available.

WEST: FOBs linger about the same they have been the last 4 weeks. Supply is still snug from both growing regions in the west. Quality is fair at best due to heat.

MARKET ALERT

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

We are closely monitoring Hurricane Florence. Expect tomato & dry veg crops to be significantly affected once landfall is made. We will send updates once we know the damage.



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Produce *(continued)*

Berries:

Blackberries

Prices are unchanged. California supplies are past peak production and will soon start diminishing. Mexican stocks will meet demand. Quality is very good in both growing regions: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is steady. Stocks are most plentiful in California, but Mexican volume will rise later this month. Domestic quality is best: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

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

Strawberries

Expect higher markets. Supplies from the Salinas/Watsonville, California growing region are past peak production. Santa Maria stocks will ramp up over the next few weeks. Cold-chain management remains critical to maximizing shelf-life through the hot summer and early fall months. Quality is very good.

Bok Choy

Quality is average, and demand is fair

Broccoli

Prices are inching down. California supplies are increasing, but Mexican stocks are down due to rain. Overall quality is fair: hollow core and pin rot are minor issues.

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

Quality is good, supplies have slightly improved, and demand is steady.

Celery

Supplies are normal and the markets are slightly better, but they are still just average with moderate demand. Quality is good out of Salinas.

Cilantro

Supplies and quality are expected to improve next week, but we are still seeing higher prices and slight shortages.

Corn

Good quality is mixed out of Michigan and New York. South Georgia will be ramping up this weekend.

Cucumbers

EAST: A very active market in the east. Michigan is mostly done with very limited supply coming from the region. Local fall crops are on the horizon, but that could be up in the air now with Florence about to make landfall. FOBs are up with fair to good quality available.

WEST: Markets are still very active in the west. New blocks were expected to begin before the end of September, but reports are that the crops are now delayed about another 7-14 days. Expect high prices until the end of September or beginning of October. Quality is good to excellent.



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Produce (continued)

Eggplant

EAST: Supply is a little snug with MI done and GA just beginning. Prices are up with mostly good quality available. Some fruit is showing signs of age, with soft spots being the most common issue.

WEST: Good quality and good supply are both available, mostly from the Fresno region. FOBs are steady.

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

The cabbage market is easing in the Midwest (Wisconsin) as well as the West Coast. Markets are still firm.

Red Cabbage

The cabbage market is easing in the Midwest (Wisconsin) as well as the West Coast. Markets are still firm.

Green Onions

Iced - The market is active due to lighter supplies. Iceless - Like the iced market, the iceless market is active due to lighter supplies.

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.

Lemons

Market is still very strong and is trying to adjust as we continue to see Chilean arrive and also seeing a bit more Mexican fruit crossing, 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 late in September. D2 is in a little gap. 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. D3 is getting rolling in a light way. Fruit has been through a lot of heat and is being gassed. 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.



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Produce *(continued)*

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 quality and demand are good.

Iceberg Lettuce

Supplies and demand are steady, and quality is good.

Romaine

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

Romaine Hearts

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

Limes

The market is steady. Supplies are adequate; small sizes are most plentiful. Quality is average. Shippers recommend ordering for quick turns at this time of year.

Napa

Supplies and demand are steady.

Onions

Idaho/Oregon and Washington are now shipping all three colors fresh out of the field. Quality is strong to start, and harvest is running smoothly with minimal interruption or weather concerns. Skin is starting to get better as the onions continue to cure down. While sizing on yellows is still peaking to jumbos, the availability of larger-sized onions is improving. We are seeing Colossal and Super Colossal in better supply, which has resulted in some reduced pricing on these items. We are seeing white onions are still in short supply and remain elevated in price. Reds are much more plentiful as well, and those prices have also been reduced. Overall, the season appears to be leaning toward a more 'normal' year in terms of size, yield and quality.

Oranges

Market very strong across the board, Valencia's are peaking on mid to larger sizes so we are seeing much 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.



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Produce *(continued)*

Parsley(Curly, Italian)

Quality and supplies are good.

Green Bell Pepper

EAST: Supply is starting to tighten with FOBs moving up. Quality continues to be a bit of a challenge due to vicious rain and heat cycles.

WEST: Supply is starting to tighten with FOBs moving up, and pressure to continue to go up by the end of this week. Quality is mostly good.

Jalapenos (Chiles)

EAST: - Light, but steady supply continues from the east. Scattered local programs are available, but with Florence on the horizon, we could see this change quickly. FOBs are steady with good to excellent quality available.

WEST: Supply is back to normal with pricing about steady. Great quality is available.

Red and Yellow Bell Pepper

The market is low; stocks are sufficient. Quality is very good: peppers are deeply colored and subtly sweet.

Pineapple

The market remains high; supplies are tight in both growing regions. Quality is very good: sugar levels vary from 13 to 16 Brix.

Idaho Potatoes

Harvest remains underway and all growers are exclusively shipping new crop Norkotahs out of the field. Quality and availability have been very strong across the board on most sizes. Overall, there is a good mix of size throughout the state. We do not anticipate the new crop Burbanks becoming available until around the middle of October. By that time, all potatoes will be coming exclusively out of storage and should be through the sweat and curing process.

Pumpkins

Now available out of Indiana and Michigan.

Radishes

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

Salad Blends

Prices are level; iceberg and romaine supplies are sufficient. Inspectors continue to closely monitor pack-outs for chunks and core material to minimize 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)

Quality and supply have improved and product is available.

Spinach (Baby)

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

Spring Mix

Although volume remains low and prices are higher than normal, quality is starting to rebound. Humid weather has caused mildew problems, negatively impacting shelf-life, but temperatures are shifting.

Yellow Squash/Zucchini

EAST: With Michigan mostly done and the eastern Carolinas having only light supplies, markets are a little active, moving upward. GA is just beginning but is not producing enough supply to cover demand. Quality is fair to good.

WEST: Santa Maria is winding down and Nogales still has about 2 weeks before their start date. FOB's continue to move upward. Quality is fair at best.



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Produce (continued)

TOMATOES (EAST)

Rounds

With only a few weeks left in the late summer crop, Alabama & Tennessee are still harvesting light, but steady supplies. Fall crop South Carolina has begun with Florida still about 4 weeks out. Demand remains very weak. With Hurricane Florence on the horizon, we could see a rapid shake up in the east. These crops generally grow along river banks. Growers are extremely concerned about the high rainfall causing river flooding, which will have a major impact on the last few weeks of their planting cycle. With that, FOBs are actually down a little, but we do not expect this to hold into the following week. Quality has been various from all regions and field by field, but overall has been good.

Romas

Light supplies still come from mostly the TN region. With Hurricane Florence on the horizon, we could see a rapid shake up in the east. These crops generally grow along river banks. Growers are extremely concerned about the high rainfall causing river flooding, which will have a major impact on the last few weeks of their planting cycle. With that, FOBs are steady, but firm. Quality has been various from all regions and field by field, but overall has been good.

Grapes

There has been a little bump in supply to go alongside the weak demand. FOBs are down. Quality is still a little shaky but overall good. Fruit has been through a lot of rain and heat, so we recommend keeping a tighter than usual inventory.

Cherries

Experiencing lackluster demand as well, cherries will move into next week unchanged. Quality is mostly good, but occasionally will show signs of rain and heat stress concerns.

TOMATOES (WEST)

Rounds

Most growers are starting to clean up their inventories, putting pressure on the split market. There are some lower prices available; however, quality can be questionable. Good quality fruit FOBs are balancing out, with extra-large & large down slightly. Mediums remain unchanged. Quality has been excellent for California tomatoes; however, there are still many soft tomatoes in each box. This is normal for this seed variety.

Romas

Despite having about 7-10 days with good volume, it has tightened back up. Demand has strengthened and CA fruit is poor quality. Most demand is turning towards Baja for better fruit. With that being said, there is a major split pricing market between CA & Baja. We advise using Baja fruit that is much better. FOBs move back upward to account for the demand increase.

Grapes

It's been a rocky summer with supply & demand both moving up and down almost every other week. We look forward to downward movement next week with FOBs dropping a little. Quality is still fair, but improving.

Cherries

Supplies remain snug, yet steady. FOBs will remain unchanged as we move into next week. Quality is mostly good.

Tree Fruit

Plums

Markets are firming on black and red varieties. Markets remain firm and should steadily rise as the season winds down.

Peaches

Supplies are good on yellow and white tray packs as well as volume fill out of the San Joaquin Valley. In the Southeast, ½ Bu's are available on yellow flesh varieties. We expect the summer harvest to finish up mid-September. Yellow and white flesh varieties are available out of the PNW loading in Yakima.

Nectarines

Supplies are good on yellow and white tray packs as well as volume fill out of the San Joaquin Valley. Volumes will begin a slow decline this week with the end of season expected sometime mid to late September. Yellow and White flesh varieties available out of the PNW loading in Yakima.

Watermelons

The market is low; most supplies are ample. A few melons may be odd-shaped, but quality is very good. Sugar levels range from 11 to 12 Brix.

