



# MARKET TRENDS

FOR WEEK ENDING OCTOBER 12, 2018



# MARKET TRENDS

OCTOBER 12, 2018

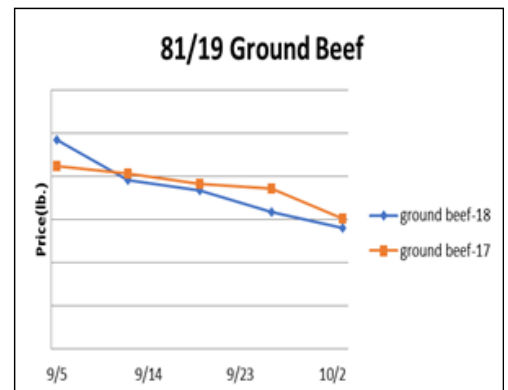
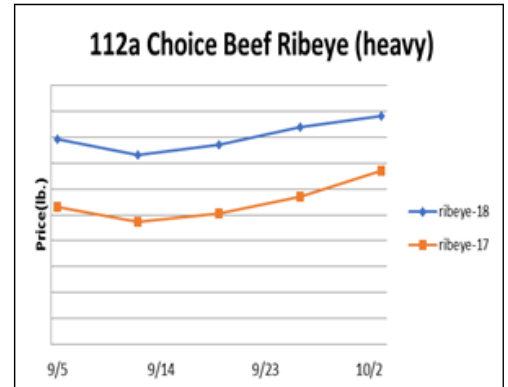
**PERFORMANCE**  
FOODSERVICE



## Beef, Veal & Lamb

Beef production last week fell .9% from the prior week and was .1% smaller than last year. Current cattle supplies in feedlots are abundant which is expected to boost beef output. The USDA is forecasting Q4 beef production to be 4.8% stronger than last year. Beef demand has been solid, especially from exports, but the deferred CME monthly live cattle futures are priced notably above the spot market which should temper forward beef sales. Since 2013, the average move for the choice ribeye market during the next nine weeks has been 24.9% higher. But, this year's remaining price appreciation for ribeyes could be less intense, and the seasonal peak will likely arrive earlier than usual.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Steady	Short	Higher
Ground Beef 81/19	Decreasing	Good	Lower
Ground Chuck	Decreasing	Good	Lower
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)	Increasing	Good	Lower
116 Chuck (ch)	Increasing	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)	Decreasing	Good	Higher
121e Cap & Wedge	Increasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Lower
168 Inside Round (ch)	Increasing	Good	Lower
169 Top Round (ch)	Increasing	Good	Lower
171b Outside Round (ch)	Increasing	Good	Lower
174 Short Loin (ch 0x1)	Decreasing	Good	Higher
174 Short Loin (pr 2x3)	Increasing	Good	Lower
180 0x1 Strip (ch)	Decreasing	Good	Higher
180 0x1 Strip (pr)	Decreasing	Good	Lower
184 Top Butt, boneless (ch)	Decreasing	Good	Higher
184 Top Butt, boneless (pr)	Steady	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Higher
185a Sirloin Flap (ch)	Decreasing	Good	Higher
185c Loin, Tri-Tip (ch)	Increasing	Good	Higher
189a Tender (sel, 5 lb & up)	Increasing	Good	Higher
189a Tender (ch, 5 lb & up)	Increasing	Good	Higher
189a Tender (pr, heavy)	Increasing	Good	Lower
193 Flank Steak (ch)	Decreasing	Good	Higher
50% Trimmings	Decreasing	Good	Lower
65% Trimmings	Decreasing	Good	Lower
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)	Increasing	Good	Higher
Veal Top Round (cap off)	Increasing	Good	Higher



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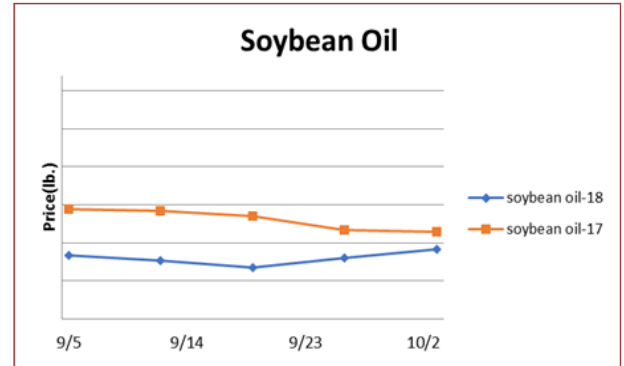
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## Grains

Food oil prices have been on the increase as of late. Nearby soybean oil futures climbed to their most expensive level since June this week. World food oil supplies are ample. Further, U.S. soybean trade is expected to suffer in the coming months. These factors should limit the upside potential in food oil prices.

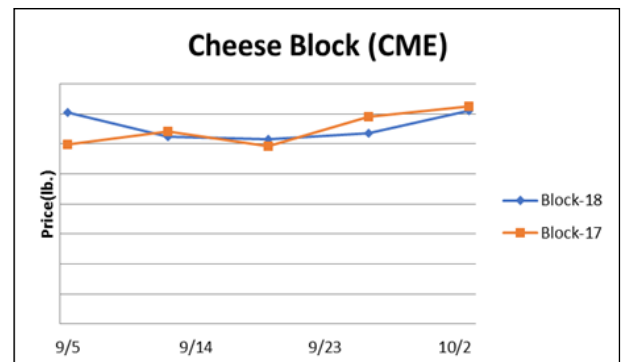
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher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



## Dairy

The CME butter market remains fairly steady. Butter demand has been solid but stocks are adequate. As of August 31st, U.S. butter holdings were 3.8% bigger than last year and the second largest for the date since 1993. History suggests that lower butter prices could be forthcoming. The five-year average move for the CME butter market from this week through the end of the year is a decline of 13.4%. The CME spot cheese markets remain far apart with blocks at the steepest level above barrels in several years. This suggests that the upside price risk in cheese blocks from here is nominal.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Lower
Cheese Blocks (CME)	Increasing	Good	Lower
American Cheese	Decreasing	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	Higher
Nonfat Dry Milk	Decreasing	Ample	Higher
Whey, Dry	Increasing	Good	Higher
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	Higher



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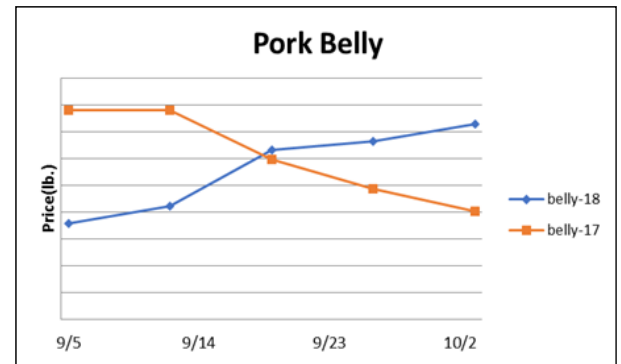
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## Pork

Pork output last week rose 9.8% from the prior week and was .5% more than a year ago. Hog slaughter was a new weekly record. The USDA reported that the September 1st U.S. hog and pig inventory was 3% larger than 2017 and the biggest for the date since 1998. The breeding herd rose 3.5% (yoy), so look for big hog supplies this fall. Pork output this quarter is projected to be 6.3% larger than last year. The pork markets usually weaken from mid-October through year-end, but this year's seasonal drop may be limited if African swine fever worsens.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Increasing	Ample	Higher
Sow	Increasing	Ample	Lower
Belly (bacon)	Increasing	Good	Higher
Sparerib(4.25 lb & down)	Decreasing	Good	Higher
Ham (20-23 lb)	Increasing	Good	Higher
Ham (23-27 lb)	Decreasing	Good	Higher
Loin (bone in)	Decreasing	Good	Higher
Babyback Rib (1.75 lb & up)	Decreasing	Good	Lower
Tenderloin (1.25 lb)	Decreasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Steady	Good	Higher
Picnic, untrmd	Increasing	Good	Lower
SS Picnic, smoker trm box	Decreasing	Good	Lower
42% Trimmings	Decreasing	Good	Higher
72% Trimmings	Decreasing	Good	Lower



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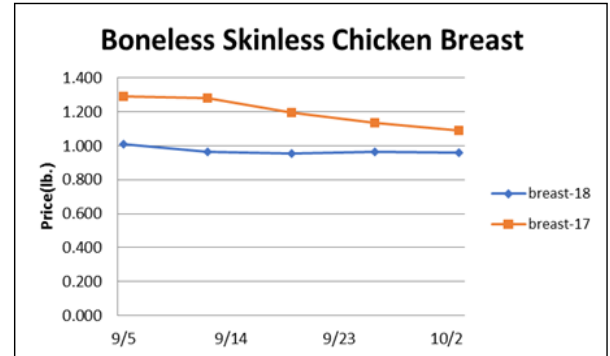
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## Poultry

For the week ending September 22nd, chicken production grew 1% from the prior week, but was 2.3% smaller than the same week in 2017. Chicken demand has been lackluster despite the lower wholesale chicken markets. Solid beef demand is likely tempering chicken consumption. The ARA Chicken Breast Index is the lowest for this time of year since at least 2005. The ARA Chicken Wing Index is the cheapest for any week in early October since 2011. Yet, because value is becoming more apparent, it could temper the seasonal chicken price declines that typically occur in Q4. The large-shell egg market usually peaks soon. Since 2013, the average move for the Southeast large-shell market during the next three weeks, including this week, was down 16.1%.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Decreasing	Good	Lower
Wings (jumbo cut)	Increasing	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)	Decreasing	Good	Lower
Tenderloin Index (ARA)	Increasing	Good	Lower
Legs (whole)	Decreasing	Good	Higher
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	Increasing	Good	Higher

## Eggs

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



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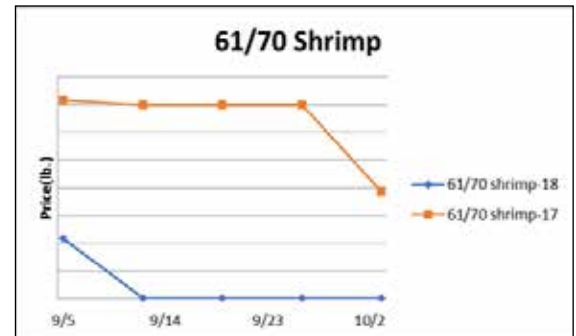
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## Seafood

Snow crab prices remain inflated due to the tight world supply brought on by lower quotas in both the U.S. and Canada. Alaska will publish their 2018-19 Bering Sea snow crab quota soon. Expectations are for their quota to be up significantly based on the latest stock assessments. Lower snow crab prices could occur as the 2019 year progresses

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	Lower
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	Higher



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

## Various Markets

Coffee prices have found support during the last week despite the ample world supplies. The Brazilian presidential election will occur shortly which could bring some clarity to their economic situation and provide support to their currency. The risk in coffee prices remains 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	Higher
Coffee lb ICE	Increasing	Good	Lower
Sugar lb ICE	Decreasing	Ample	Lower
Cocoa mt ICE	Decreasing	Short	Higher
Orange Juice lb ICE	Decreasing	Good	Lower
Honey (clover) lb	Increasing	Good	Higher



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## Produce

### Market Overview

Valencia's and lemons are still showing higher prices than normal for this time of the year, but they continue to improve weekly. There are also some quality issues showing up for lettuce and tender leaf commodities.

### WATCH LIST

- Sweet Potatoes and Yams
- Squash Zucchini
- Roma, Grape, and Cherry Tomatoes (East, West, and Mexico)

### Apples & Pears

New crop Washington Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are on the market. Packer label Honey-crisps are also being shipped. Packer label Braeburn and Pink Lady apples will be available in mid-October. Sugar levels are approximately 13 to 14 Brix. The market is unchanged. New crop Washington Bartlett and D'Anjou Pears are available. California Bartletts will continue shipping through this month; small sizes are limited. Sugar levels range from 12 to 14 Brix.

### Artichokes

Quality is excellent, and demand is good.

### Arugula

Quality and supplies have improved and product is available.

### Asparagus

The market is easing. Mexican and Peruvian supplies are on the market. Quality is best in Mexico: spears are deep green and tips are compact.

### Avocados

Prices are steady. The California season is almost over. Mexican supplies have increased. Peruvian fruit is also on the market. Quality is good: oil content is highest in Peru.

### Bananas

Demand on this item remains firm and supplies are expected to remain good through the rest of the year. Quality is good.

### Beans

EAST: Still an active market with FOBs up again significantly. NC is in a slight gap towards the end of their season while GA only has light supply in the early part of their season. Quality has been poor from all areas, but should improve as GA ramps up.

WEST: Limited supply from central valley & coastal California are keeping FOBs high, but steady. Quality is fair to good.

### MARKET ALERT

- Cabbage (Green and Red) - EXTREME
- Cilantro - EXTREME
- Green Onions - EXTREME
- Lemons - EXTREME
- Mushrooms - ESCALATED
- Oranges (Valencias) - EXTREME
- Sugar Snap Peas - EXTREME





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## Produce (continued)

### Berries:

#### Blackberries

The market is unchanged. The California season is ending. Mexican stocks are sufficient to meet demand. Overall quality is very good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels range from 12 to 13 Brix.

#### Blueberries

Prices are slightly lower than last week. Volume is high in California and Mexico. Domestic quality is very good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

#### Raspberries

Prices are stable. The Watsonville season has ended, but new crop harvesting has started in Oxnard and Santa Maria. New crop Mexican berries will be available in a week or two. Flavor is sweet: sugar levels are moderately high, ranging from 13 to 14 Brix.

#### Strawberries

Prices are steady at upper levels. Although the Salinas/Watsonville, California season is winding down; supplies will be available through October. New crop Santa Maria and Oxnard stocks are limited, but will increase over the next several weeks. Sugar levels range from 14 to 15 Brix.

#### Bok Choy

Quality is average, and demand is fair.

#### Broccoli

The market is holding steady at high levels; stocks are limited in California and Mexico (due to rain). Domestic quality is very good: hollow core and pin rot are occasional problems.

#### Brussels Sprouts

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

#### Cantaloupe

Market strengthening as we are transitioning to the desert for the Fall deal next week. We are still going with descent out of the Westside and overall quality is very good, most of the varieties as ESL Harper they are very strong but sugars are good. We are peaking on 12 ct and the larger fruit is a little tougher to come by.

#### Carrots

We are seeing both good quality and volume.

#### Cauliflower

Weak prices persist; volume is high. Quality is good: creamy color is a slight issue.

### Celery

The market is steady; large sizes (24 count) are more abundant in California than small (30 count). Quality is very good: dry pith and growth cracking are minimal.

### Cilantro

EXTREME Supplies and quality are fair.

### Corn

This market is done in the north, and Georgia is ramping up slowly. Markets are up this week, and quality is fair.

### Cucumbers

EAST: Things are still a little tight, but improving. We are in the top end of pricing, expecting markets to fall by early next week. GA is producing good numbers, but not enough to meet demand. NC usually helps at this time of year, but Florence took this away, with only fair quality coming from this region. GA's quality is good to excellent.

WEST: With Rosa dropping more than normal rainfall in the Baja area, supply is still snug. Nogales is off to a very slow start, but expected to improve over the next 10 days. FOBs are steady with excellent quality at this time. Depending on Rosa's affects, we could see some quality concerns from Baja, but that is unknown at this time.

### English Cucumbers

Supplies are improving as volume increases from Spain and Holland eliminating pro-rates as well as decreases in the market. We should continue to see improvements; new crop Mexico should ramp up in two weeks.



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## Produce (continued)

### Eggplant

EAST: Cooler temps have slowed production, but light demand is keeping FOBs steady. GA is expected to get into new blocks next week which may bring some pricing relief. Quality has been fair to good.

WEST: Cool weather and rainy conditions keep pressure on eggs out west. The CA desert expects to start in mid to late October which will bring relief. Quality has been 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

EXTREME The cabbage market has turned back around and have firmed up as supplies have become critically short in the West causing escalation of pricing for the entire category.

### Red Cabbage

EXTREME The cabbage market has firmed up as supplies have become critically short in the West causing escalation of pricing for the entire category.

### Green Onions

EXTREME Iced –Due to the rain coupled with already light supplies and local production winding down in the East, we will see demand exceeding supplies over the next two weeks. Iceless – As with iced market, the iceless market is also anticipated to see demand exceeding supplies over the next two weeks..

### Honeydew

Market is strengthening with tight supplies of 5's, 6's and better supplies of 8's on the Westside and overall quality is very nice and sugars are very good as well. We will be going until next week on the Westside, and then transitioning to the desert for the fall deal.

### 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 adjusting as we continue to see Chilean arrive and also seeing a 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 mid-October and that should be the last of the arrivals for us. We are going on our D3 fruit and are going with some descent volume, fruit is peaking on 140's and 115's at this point, but will see better volumes of smaller fruit as we are size picking at this point. 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 Fruit has been through a lot of heat and is being gassed so you will see some skin breakdown in some of the weaker lots. We expect the market to stay steady, and we anticipate starting Dist. 1 around the middle of November.

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## Produce (continued)

### Lettuce:

#### Butter

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

#### Green and Red Leaf

Green leaf supplies are very light, quality is fair, and demand is good. Red leaf supplies are light, demand is good, and quality is fair.

#### Iceberg Lettuce

Supplies continue to be below budget. The market has been very active, but prices have lowered. There is a good chance prices could bounce back higher.

#### Romaine

Supplies are slightly below normal, and demand and quality have both been fair.

#### Romaine Hearts

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



### Limes

Prices are level. Supplies are abundant, but large sizes are limited. Quality is very good.

### Napa

Supplies are below normal this week. Demand is steady.

### Onions

Idaho/Oregon and Washington will wrap up harvest over the next two weeks. Quality is strong to start, and sizing and yields appear to be very good. Skin is starting to get better as the onions continue to cure down. We are seeing a surplus of Colossal and Super Colossal in better supply, which has resulted in some reduced pricing on these items. 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. What was once expected to be a very large crop has reduced size in part to the heat wave that the Northwest has been experiencing over the last several weeks.

### Oranges

Market very strong across the board we are seeing several other Valencia shippers finished for the season, Valencia's are peaking on larger sizes so we are seeing much fewer of the small ones demand exceeds supply on 88's, 113's and 138's and this will be the case going forward through the Valencia season. It is also a lighter crop so we will be fighting supplies of fruit through the remainder of the season until we start navels around the first of November. The overall quality of the Valencia's is 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 88's, 113's and 138's on orders just a heads up, if you do not want navels please let us know. Please keep in mind that this fruit is about 18 months old on the tree, and the trees are also carrying next year's crop which puts lots of stress on the tree this 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 season, hoping to start navels earlier than the first of November. The California navel crop estimate for about 20% more volume than last year and we will be peaking on 88's and smaller as we start the season around the first of November possibly a week earlier.

### Parsley(Curly, Italian)

Quality and supplies are good.

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## Produce *(continued)*

### Green Bell Pepper

EAST: There are still a handful of local eastern deals still lingering, but there is no real volume from these programs. GA & SC are both the major players here, but also have light supplies. FOBs are steady moving into next week with great quality coming from both regions.

WEST: Rosa impacted the already light supply from Baja, pushing FOBs upward. While at this time, there isn't a major shortage of supply; things will be tight for the next 10 days until growers can dig into wet fields. CA supply is light as well. Quality has been excellent, but we could see it diminish as growers evaluate the results from Rosa.

### Jalapenos (Chiles)

EAST: With most local deals done in the northeast and mid-west, most are turning to GA & FL, putting performance pressure on both areas. Supply will be snug for the next 2 weeks as GA gets started by end of next week. FOBs are up slightly. Quality has been good to excellent.

WEST: The west is on the lower end of production with feelings of upward pricing pressure, especially moving towards the end of this week. Pending weather, production should hopefully improve by middle of next week. Quality has been excellent recently.

### Red and Yellow Bell Pepper

Prices are slightly higher than last week despite sufficient supplies on the market. Quality is very good: peppers are deeply colored and subtly sweet..

### Pineapple

Prices are up; volume remains low in both growing regions. Quality is very good: sugar levels range from 13 to 16 Brix.

### Idaho Potatoes

Harvest season continues and all growers are shipping Norkotahs out of the field. Quality and availability have been very strong across the board on most sizes. There is an abundance of large potatoes with somewhat unstable pricing. 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 unchanged; volume is average. Inspectors have reported mildew in some raw product due to humidity; they're choosing only the best lots to achieve the highest quality packs.

### Snow and Sugar Snap Peas

EXTREME Sugar snap peas are currently experiencing a shortage in supply resulting in price increases. This is due to the fact that the Salinas growing region has completed its growing season, and the next seasonal region in Mexico has been negatively impacted by the rains from Hurricane Rosa. This extreme weather has affected the crop resulting in very poor quality and a delay in harvest.

### Spinach (Bunched)

Quality is fair and product is available.

### Spinach (Baby)

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

### Spring Mix

Prices remain elevated; humidity has caused mildew, especially in red varieties.

### Sweet Potatoes and Yams

WATCHLIST This market has spiked due to heavy damage in the Carolinas. Growers are currently assessing the damage, so it's still too soon to react. However, supplies are still good out of Mississippi.



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## Produce (continued)

### Yellow Squash/Zucchini

EAST: A mixed bag here with GA still ramping up. There may be a few local deals lingering, but no significant volume available. Yellow is the most plentiful while zucchini is still quite snug. Quality is good to excellent.

WEST: New crop mainland MX is very slowly ramping up, but with some lingering supply from a few other areas, FOBs move down from last week on yellow and on zucchini. Zucchini still remains snug. Quality on yellow has been poor to fair with major scarring issues. Zucchini quality is mostly good.

### TOMATOES (EAST)

#### Rounds

As TN & AL quickly wind up with only about 10 days left of light production we are seeing more pressure on GA & FL to ramp up. Quincy has started in a very light way with no real volume yet, but expected to pick up soon. VA is completely done with round production. Rain has played a factor in older fields in the east forcing fields to end quicker than growers hoped. There is a range of FOBs from all growing areas with Quincy quoting the highest. Quality from all areas has been fair to good.

#### Romas

Roma's are still the tightest and most firm market. Rain has played a significant role in this category. TN & NC are about 10 days away from finishing; however, the rain could end things sooner. GA & Quincy will have limited supply while Palmetto/Ruskin is still a about a month away from beginning. Until Palmetto/Ruskin begins, Roma's will continue to be light. FOBs are fairly steady for next week, but pending weather conditions, we could see things tighten up even more. Quality has been fair to good recently due to rain.

#### Grapes

VA will continue for another 1-2 weeks while TN, NC, & AL volume remains extremely light. Most growers with supply hope to make it to the 15th, but with rainy conditions their crop could end early. Quincy & GA have very light supplies. We look forward to Palmetto/Ruskin beginning late this week/early next week. There is significant upward pressure on FOBs with the scattered supply. Look for pricing to increase. Quality has been fair to good.

### Cherries

Cherry supply has lightened up a bit putting some pressure on FOBs to move upward. Quality is fair to good due to rainy conditions.

### TOMATOES (WEST)

#### Rounds

Rounds are plentiful and readily available, however, are feeling a bit of a rainy market from now Tropical Storm Rosa. FOBs are up across the board, however, there is still somewhat of a split market with quality. "Good" quality demands a higher price point, but even that fruit is very soft and weak. MX vine ripe volume is light this week as we eagerly wait for fall crop to begin around the 15th. We recommend keeping your round inventory as tight as possible.

#### Romas

Production in both Baja & California remains very light and supply is extremely tight. FOBs move up in CA while Baja took a bigger jump. Fruit is in the hands of only a few suppliers. Baja fall crop will begin around the 3rd week of October, but until then, expect higher FOBs and tight supplies. Quality has been mostly good, however, the CA fruit is feeling a little soft.

#### Grapes

Supply continues to be extremely light and tight with fruit being in the hands of only a few growers. Pricing remains mostly steady, but still very high. Baja fall crop is about 2-3 weeks away which will give much needed relief. Quality has deteriorated and is only fair at best.

### Cherries

With an increase in demand and rainy conditions, supply has tightened up. Look for FOBs to move up. Quality is fair to good.

### Tree Fruit

Prices are elevated. The domestic nectarine and peach seasons have ended; plums will remain on the market through this month. Quality is very good: nectarine and peach sugar levels vary from 10 to 12 Brix, while plums range from 12 to 16 Brix.

### Watermelons

The market has inched up. The California season is wrapping up; growers are transitioning south to the desert regions and Mexico. Inspectors are reporting some odd-shaped melons, but overall quality is very good. Sugar levels range from 12 to 13 Brix.

