



MARKET TRENDS

FOR WEEK ENDING SEPTEMBER 7, 2018



MARKET TRENDS

SEPTEMBER 7, 2018

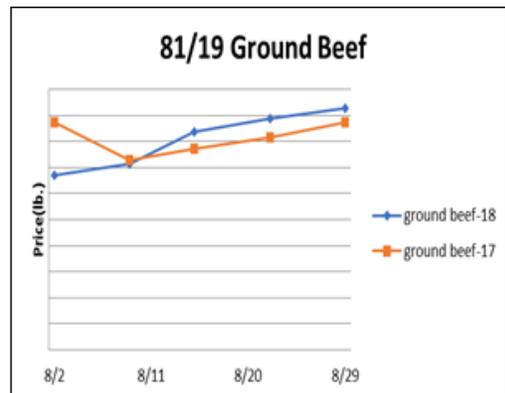
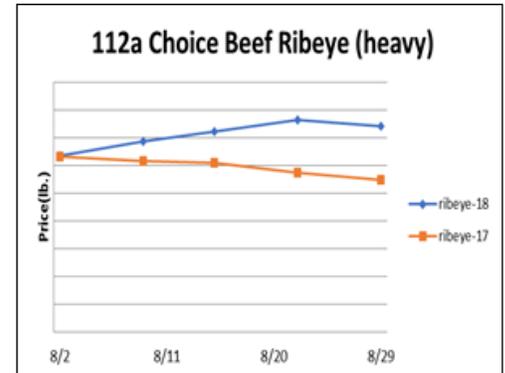
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Beef output last week declined 3.3% from the prior week and was 2% smaller than the same week last year. The August 1st cattle on feed inventory was 4.6% larger than the previous year. Cattle placements into feedlots during July were up 7.9% from last year, but the average placement weight was down 1.1%. The USDA anticipates Q4 beef production to be 4.8% more than 2017. This should temper seasonal price gains for holiday items such as ribeyes during the fall. Since 2013, the average move for choice ribeye prices from late-September through November was up 24.8%. Retail beef prices in July were .4% more expensive than June but were only up .1% compared to last year.

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	Increasing	Good	Higher
Ground Chuck	Increasing	Good	Higher
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)	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)	Decreasing	Good	Higher
120a Brisket (ch)	Increasing	Good	Higher
121c Outside Skirt (ch/sel)	Decreasing	Good	Higher
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Decreasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Lower
168 Inside Round (ch)	Increasing	Good	Higher
169 Top Round (ch)	Decreasing	Good	Lower
171b Outside Round (ch)	Increasing	Good	Lower
174 Short Loin (ch 0x1)	Increasing	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)	Steady	Good	Lower
184 Top Butt, boneless (pr)	Decreasing	Good	Lower
184-3 Top Butt, bnls (ch)	Increasing	Good	Higher
185a Sirloin Flap (ch)	Increasing	Good	Higher
185c Loin, Tri-Tip (ch)	Decreasing	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)	Decreasing	Good	Higher
50% Trimmings	Decreasing	Good	Higher
65% Trimmings	Decreasing	Good	Higher
75% Trimmings	Steady	Good	Lower
85% Trimmings	Decreasing	Short	Lower
90% Trimmings	Decreasing	Short	Lower
90% Imported Beef (frz)	Increasing	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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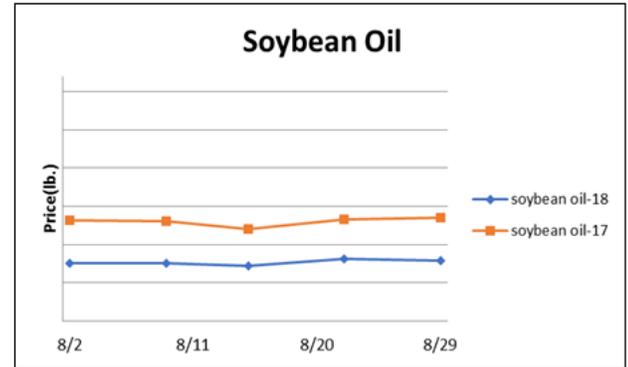
SEPTEMBER 7, 2018



Grains

The Trump Administration recently announced aid programs for farmers suffering from the trade issues. Soybean farmers will receive a \$1.65 per bushel credit on 50% of their production while corn (\$.01) and wheat (\$.14) farmers will receive much less. If longstanding, this could put downward pressure on soybean prices.

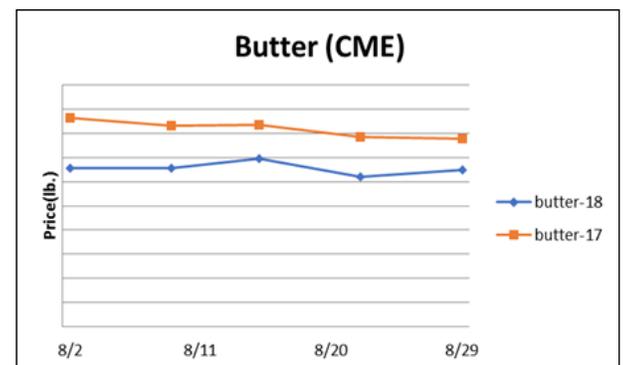
	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Higher
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Higher
Distillers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



Dairy

The cheese markets have firmed which isn't unusual for August. As the school sessions begin, milk is diverted away for product production. Further, milk output is seasonally slow due to warm temperatures. July 31st cheese holdings were 3% larger than last year and a record for any month. Further, the cheese stock build during the month was the second largest for any July since 2011. Ample supplies and fading international prices could limit any further cheese price gains. July 31st butter stocks were also 3% better than the prior year and the second largest for the month since 1993.

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



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SEPTEMBER 7, 2018

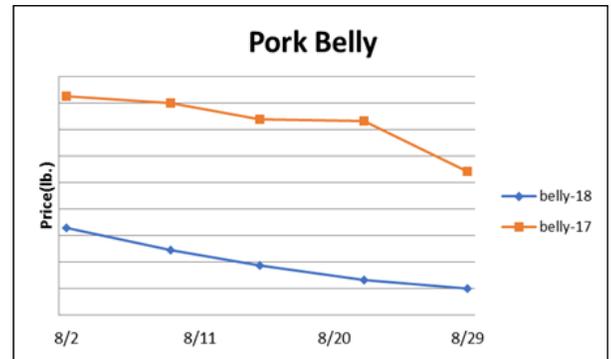
PERFORMANCE
FOODSERVICE



Pork

Pork production last week was up 3.3% and was 7.7% larger than the same week in 2017. Hog supplies are numerous and expected to keep pork production active. The USDA is projecting Q4 pork output to be 6.3% more than last year which should aid seasonal price declines this fall. There is no news about African swine fever in China, but this is being monitored closely as it may boost demand for U.S. pork. July 31st pork belly stocks were up 119% versus 2017. Pork belly prices are the cheapest since May 2015, but the downside risk from here is small.

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



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SEPTEMBER 7, 2018

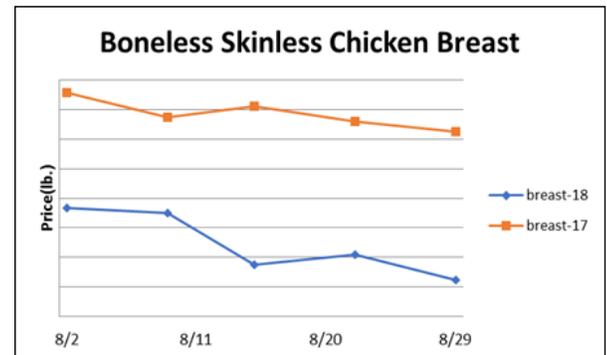
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Poultry

For the week ending August 18th, chicken production increased 2.2% from the previous week, was 5.1% better than last year and a record. The six-week total of chicken output is 2.6% above 2017. Broiler slaughter in the last six weeks has trended 1.6% above last year while weights have been 1% heavier. The broiler type chick hatch in July was 2% bigger than a year ago which suggests that annual chicken production gains are likely to occur in the coming weeks. The number of broiler layers grew 2.2% during July, but it was the smallest year-over-year gain since March 2017. A tightening broiler layer supply could temper chicken output gains this winter and support prices. In the near-term, expect chicken wing prices to seasonally rise in September.

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	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)	Increasing	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)	Increasing	Good	Lower
Turkey Breast, Bnls/Sknls	Increasing	Good	Higher

Eggs

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



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SEPTEMBER 7, 2018

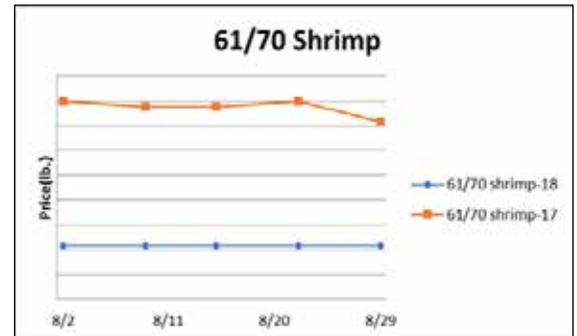
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FOODSERVICE



Seafood

The inflated U.S. dollar has continued to encourage solid salmon imports. During June, the U.S. imported 9.9% more salmon than the previous year. However, world prices have risen due in part to tighter supplies. The salmon markets may remain above 2017 levels into the fall. But, solid imports are anticipated to temper the upside risk in salmon prices.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Steady	Good	Lower
Shrimp (61/70 frz)	Steady	Good	Lower
Shrimp Tiger (26/30 frz)	Steady	Good	Lower
Snow Crab, frz	Steady	Good	Higher
Tilapia Filet, frz	Steady	Good	Higher
Cod Filet, frz	Steady	Good	Higher
Tuna Yellowfin, frsh	Steady	Good	Higher
Salmon Atlantic Filet, frsh	Steady	Good	Higher
Pollock Filet, Alaska, frz	Steady	Good	Lower



MARKET TRENDS

SEPTEMBER 7, 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 California tomato for processing harvest continues to build with 6.4 million tons sent to processors as of August 25th. A larger harvest this year is expected to limit the upside potential in the canned tomato markets during the next several months.

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



MARKET TRENDS

SEPTEMBER 7, 2018

PERFORMANCE
FOODSERVICE



Produce

Market Overview

Most commodities are steady. Cabbage is EXTREME due to shorter supply. Valencia's 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

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

NORTHWEST

We will continue to have storage supply of the major varieties of apples through the remainder of summer, and we have finished packing all varieties. The quality, condition, and color on almost all varieties looks 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.

NORTHEAST

There is light volume on reds out of New York and Chilean Granny Smith through the port of Philadelphia.

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

The weather in Mexico and Peru continues to affect sizing of jumbo asparagus which has been smaller than normal. Expect to see these issues for another few weeks, as well as shorter supplies since Mexican supplies are diminishing faster than expected. Peru will be starting in about a week.

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.

MARKET ALERT

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



MARKET TRENDS

SEPTEMBER 7, 2018

PERFORMANCE
FOODSERVICE



Produce *(continued)*

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 for the remainder of Q3.

Beans

Bean availability is adequate in the East with the strongest harvests coming from MI, NY and VA. MI beans have some quality concerns due to rain, but overall quality is acceptable. Supply remains limited in CA as cool morning weather has slowed things down in all production districts. Volumes are expected to pick up during the first week of September.

Berries:

Blackberries

Prices are starting to ease; California supplies are increasing. The Mexican season will begin later this week. Quality is very good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels vary from 12 to 13 Brix..

Blueberries

The market is steady. Stocks are the most abundant in California; expect supplies to continue increasing. Domestic quality is best: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

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

Strawberries

The market is climbing due to strong Labor Day demand; stocks are plentiful. Cold-chain management is critical to maximizing shelf-life through the hot summer and early fall months.

Bok Choy

Quality is average, and demand is fair.

Broccoli

Prices are near the bottom; expect high volume through next week. Overall quality is very good. Heads are compact with deep color and firm-yet-tender texture; hollow core and pin rot are minor issues due to high temperatures.

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. Volume is down slightly due to cooler temps having slowed the crop down. Demand is decent, we could see prices increase since supplies seem to be down.

Celery

Supplies are normal and the market is steady with very light demand. Quality is good out of Salinas.



MARKET TRENDS

SEPTEMBER 7, 2018

PERFORMANCE
FOODSERVICE



Produce (continued)

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. Good time to promote, quality is excellent.

Cucumbers

With Baja's significantly reduced production, cucumbers continue to be very short in the West. Expect more of the same until mid-September, when new crops start up. On a positive note, quality continues to be nice on the fruit that is available. Eastern cucumber volumes have definitely been on the lighter side this week as rain and weather have affected yields and quality in most of the current growing areas. With Eastern NC breaking into Fall fields this week, NJ moving into new plantings next week and GA 2-3 weeks away, better quality and volumes are on the way.

Eggplant

The Fresno, CA area has a good supply of eggplant to offer this week and should continue for at least the next 10-14 days. The East also has ample eggplant available to meet market needs, with larger volumes coming out of NJ, MI and SC. Quality is strong out of NJ and average or better from other areas. Look for new crops to come on in the Southeast over the next few weeks.



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: Cabbage is in shorter supply and we are seeing prices rise rapidly. This is primarily due to weather-related issues.

Red Cabbage

Markets remain firm despite decent supplies out of the Midwest. 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 is improving. Iceless - Like the iced market, the iceless market is improving.

Honeydew

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

JICAMA

Markets remain firm due to ongoing short supplies and will continue to see some quality and shelf life issues.

Kale (green)

Quality and supplies are good.

Kiwi

Good supplies available on Chilean product.

MARKET TRENDS

SEPTEMBER 7, 2018

PERFORMANCE
FOODSERVICE



Produce (continued)

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 on 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

Lettuce supplies continue to be below budget. Demand has been very good even with lower prices. Quality overall has been very good.

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

The market is a bit lower than last week. New crop volume is adequate; the crop is dominated by small fruit. Quality is average: fruit is juicy and tart.

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. What was once expected to be a very large crop has been reduced in size in part to the heat wave the Northwest has been experiencing over the last several weeks.



MARKET TRENDS

SEPTEMBER 7, 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 and supplies are good.

Green Bell Pepper

Bell pepper numbers are adequate but scattered in the East with product available in NJ, NY, MI, NC and several other states. Michigan has been struggling with weather-related quality concerns but growers in more southern areas are beginning to see some improvements. California producers continue to provide solid quality and volumes despite transitioning into new fields/blocks. With the Northwest also in steady production, Western markets are in good shape on bell peppers.

Jalapenos (Chiles)

Supplies remain steady in the East on core pepper varieties while quality in the west is hit or miss as transition on domestic product is slow to start. Baja continues crossing decent quality on the core line of product.

Red and Yellow Bell Pepper

Supplies have lightened up in the West and quality has declined. FOBs have gone up. Production has eased bringing the market off with deals being made on choice. Quality is very nice.

Pineapple

The market is high; supplies are limited. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

Old crop Burbank's have finished up entirely, and growers are exclusively into shipping new crop Norkotahs. Quality and availability have been very strong across the board on most sizes from 60 and smaller, however, 40s and 50s have been in short supply. Because the potatoes are so new, they are still not generating very many #2s so we are seeing those prices remain somewhat inflated for the time being. As they have been doing, we expect these prices to continue to come off with each passing week as more #2s become available. Overall, there is a good mix of size throughout the state. We do not anticipate the new crop Burbank's 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.



MARKET TRENDS

SEPTEMBER 7, 2018

PERFORMANCE
FOODSERVICE



Produce *(continued)*

Salad Blends

Prices are stable; iceberg and romaine supplies are sufficient. Quality is very good: Markon inspectors are closely monitoring pack-outs for chunks and core material to reduce potential issues 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

Quality and supply have improved and product is available.

Yellow Squash/Zucchini

Eastern squash numbers have been lighter this week, but there are many areas in production and an adequate amount of product available. Quality can vary significantly, as there are both old and new fields in production. Look for some quality improvements as growers in NC, GA, and SC move deeper into new crops/plantings. In the West, Santa Maria is seeing a dip in production as growers battle crop disease and move toward the seasonal decline. Product will be on the limited side until Mainland Mexico gets underway in about 3 weeks. Baja is starting new zucchini fields this week and should have appreciable volume in another 5-7 days.

TOMATOES

Patiently waiting for the transition to Fall crops, the East continues to struggle with round and Roma volumes and quality this week. Quality has been very hit or miss on the available fruit, depending on the specific field location, precipitation on the crop, and whether it is from earlier or later picks. Virginia is on tap to start Fall round harvests this weekend or early next week, pending weather, while other areas (TN, NC, AL) may be another 7-14 days before moving into new plantings. Grape tomato numbers have been in a lull for the past few weeks, but are coming into better numbers this week. Although it varies by area, Virginia farms report nice quality on grapes.

Round and Roma tomato yields out of the San Joaquin Valley in CA remain light this week due to bloom drop from previous heat. Baja's production is also lighter as farms await the transition to Fall plantings in mid-late September. Fortunately, there are consistent numbers from Oceanside, CA and Eastern Mexico, helping to keep supply at moderate levels. Grape tomatoes are limited out of Baja and quality is just fair. New crops will come on after Labor Day, but there are rumblings of potential issues with the newer blocks.

Tree Fruit

Prices are unchanged; stocks are adequate. Quality is very good: nectarine and peach sugar levels range from 10 to 12 Brix, while plums vary from 12 to 16 Brix.

Watermelons

The market is low; supplies are abundant in most production areas. Quality is very good: melons are juicy and flavor is mildly sweet. Sugar levels range from 11 to 12 Brix.

