MARKET TRENDS

FOR WEEK ENDING JUNE 14, 2019

PERFORMANCE FOODSERVICE

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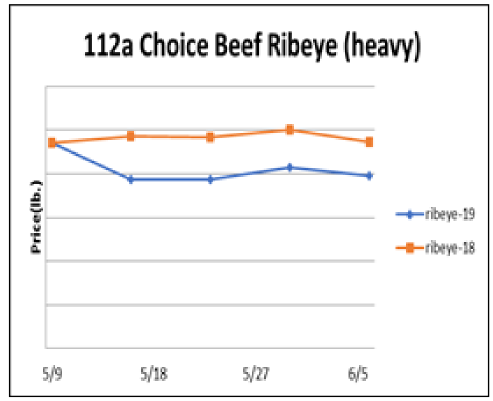
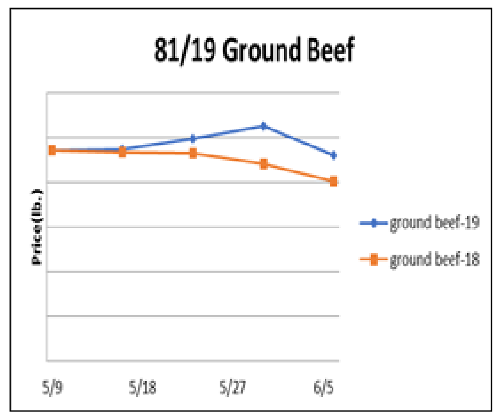
Beef, Veal & Lamb

Last week's holiday shortened beef production was 9% less than the prior week and was .2% below a year ago. Amid the lighter slaughter schedule, beef prices escalated modestly from the week prior but remain near 2% below a year ago. Choice briskets are the largest standout of the carcass, with prices jumping near 6% week-to-week, and are running more than 20% over last year. Seasonally, briskets may have another two weeks of upside potential, but given the current high price structure, coupled with a continuation of out-front sales at lower money, sideways to lower pricing is likely to occur during the summer.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Decreasing	Short	Lower
Ground Beef 81/19	Decreasing	Good	Higher
Ground Chuck	Decreasing	Good	Higher
109 Export Rib (ch)	Increasing	Good	Lower
109 Export Rib (pr)	Increasing	Good	Lower
112a Ribeye (ch)	Decreasing	Good	Lower
112a Ribeye (pr)	Increasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Increasing	Good	Higher
116 Chuck (sel)	Decreasing	Good	Higher
116 Chuck (ch)	Increasing	Good	Lower
116b Chuck Tender (ch)	Decreasing	Good	Higher
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Increasing	Good	Higher
121c Outside Skirt (ch/sel)	Decreasing	Good	Lower
121d Inside Skirt (ch/sel)	Decreasing	Good	Higher
121e Cap & Wedge	Increasing	Good	Lower
167a Knckle, Trimmed (ch)	Increasing	Good	Higher
168 Inside Round (ch)	Decreasing	Good	Lower
169 Top Round (ch)	Increasing	Good	Lower
171b Outside Round (ch)	Increasing	Good	Higher
174 Short Loin (ch 0x1)	Decreasing	Good	Lower
174 Short Loin (pr 2x3)	Increasing	Good	Lower
180 0x1 Strip (ch)	Decreasing	Good	Lower
180 0x1 Strip (pr)	Increasing	Good	Lower
184 Top Butt, boneless (ch)	Increasing	Good	Lower
184 Top Butt, boneless (pr)	Steady	Good	Lower
184-3 Top Butt, bnls (ch)	Decreasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Lower
185c Loin, Tri-Tip (ch)	Increasing	Good	Lower
189a Tender (sel, 5 lb & up)	Decreasing	Good	Higher
189a Tender (ch, 5 lb &up)	Increasing	Good	Higher
189a Tender (pr, heavy)	Increasing	Good	Higher
193 Flank Steak (ch)	Increasing	Good	Lower
50% Trimmings	Increasing	Good	Higher
65% Trimmings	Increasing	Good	Higher
75% Trimmings	Steady	Good	Higher
85% Trimmings	Increasing	Short	Higher
90% Trimmings	Decreasing	Short	Higher
90% Imported Beef (frz)	Decreasing	Good	Higher
95% Imported Beef (frz)	Decreasing	Good	Higher
Veal Rack (Hotel 7 rib)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Higher





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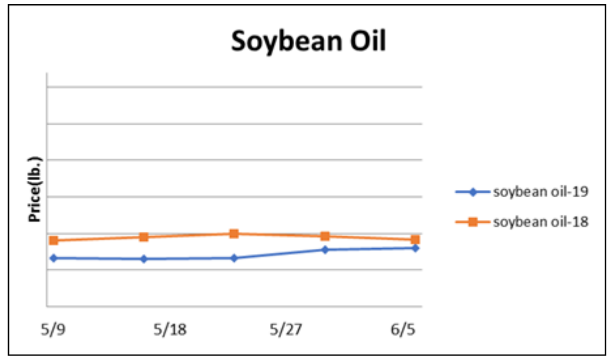
Grains

Corn and soybean planting remain behind due to persisting adverse weather in the Eastern grain belt. As of June 2nd, just 67% of the corn crop had been sowed which is a record low for the date. The USDA is expected to reduce their corn crop estimate in the coming weeks. Feed prices should remain volatile this month.

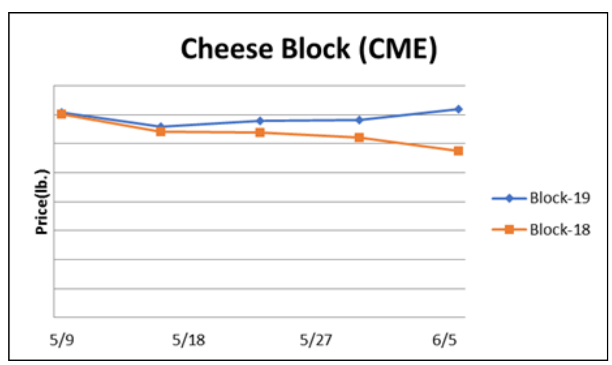
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Lower
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher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



Dairy

The spot butter market is down slightly since last week but still near the recently established one year high. April U.S. butter production was down 3.9% from the prior month and was 4.8% smaller than last year. Butter demand is solid. Since 2014, the average move for spot butter prices in the next four weeks was up 3.5%. Cheese block prices are firm this week, but barrel prices are down. April cheese output was 3.6% less than March but up .2% (yoy). Cheese exports have been active but may lessen due in part to weakening global cheese prices. Lower cheese markets in late-June is common.

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



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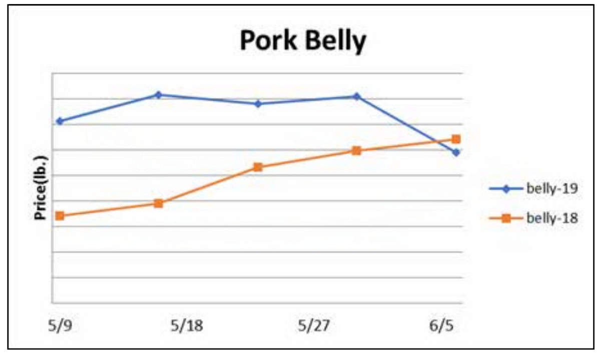
Pork

Pork production last week was up 5.8% over last year's Memorial Day week. The belly market continues to struggle finding support, but history says to view it as a buying opportunity before the typical summer price rally. Ham prices are 35% higher than last year and are expected to continue to increase into July. Mexico has been a big buyer of US hams since the retaliatory tariffs have been removed. Still, there is a possibility for another set of tariffs to be put in place due to immigration policies which could occur as soon June 10th.

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



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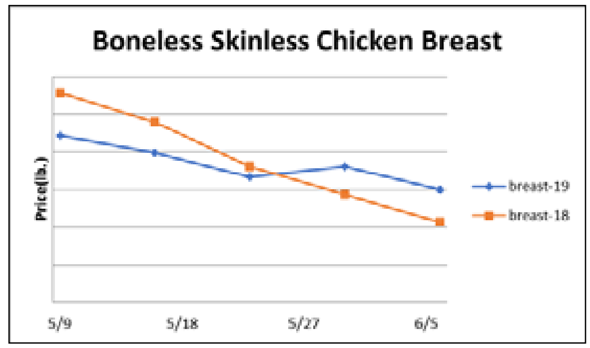
Poultry

For the week ending May 25th, weekly chicken slaughter jumped 2.9% from the week prior and was 3.2% better than last year. While continuing to fluctuate, bird weights moved back above a year ago which boosted production 4.7% more than the prior year. The six-week average for output was up 1.1% (yoy), and gains are expected to hold into July. Amid the larger production schedules, the Wholesale Chicken Index (USDA) has been fading but is still more than 5% over year ago levels. Aggressive wing and leg quarter prices are carrying the Whole Bird Index, but wing prices are likely to decline into the summer. Leg quarter prices are expected to remain firm.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Decreasing	Good	Lower
Wings (jumbo cut)	Increasing	Good	Higher
Wing Index (ARA)	Increasing	Good	Higher
Breast, Bnless Skinless NE	Decreasing	Good	Higher
Breast, Bnless Skinless SE	Increasing	Good	Higher
Breast Boneless Index (ARA)	Decreasing	Good	Higher
Tenderloin Index (ARA)	Increasing	Good	Higher
Legs (whole)	Increasing	Good	Higher
Leg Quarter Index (ARA)	Increasing	Good	Higher
Thighs, Bone In	Decreasing	Good	Higher
Thighs, Boneless	Increasing	Good	Higher



Description	Market Trend	Supplies	Price vs. Last Year
Whole Turkey (8-16 lb)	Steady	Good	Higher
Turkey Breast, Bnls/Sknls	Steady	Good	Higher

Eggs

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

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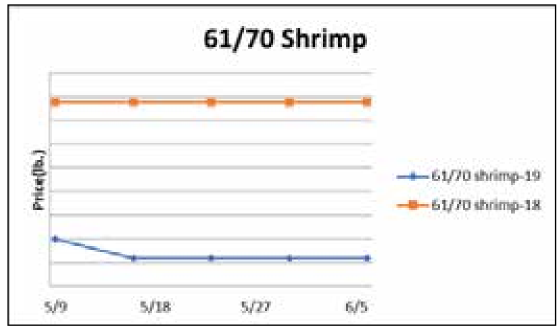
Seafood

The Canadian snow crab fishing season is progressing. As of June 4th, 73% of the Newfoundland quota had been landed. The combined Newfoundland and Gulf of St. Lawrence quota is 10.8% larger than last year but still historically small. Expensive snow crab prices are likely here to stay as small Canadian and U.S. quotas are expected 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	Lower
Salmon Atlantic Filet, frsh	Steady	Good	Higher
Pollock Filet, Alaska, frz	Steady	Good	Higher



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	Lower
PE-LLD-can liners, film, bags	Steady	Good	Lower

Retail Price Change from Prior Month

Description	Apr-19	Mar-19	Feb-19
Beef and Veal	Increasing	Increasing	Increasing
Dairy	Increasing	Increasing	Decreasing
Pork	Decreasing	Increasing	Decreasing
Chicken	Increasing	Decreasing	Increasing
Fresh Fish and Seafood	Decreasing	Increasing	Decreasing
Fresh Fruits and Vegetables	Decreasing	Increasing	Decreasing

Various Markets

Nearby Arabica coffee futures rose this past week and priced at the highest level since January. Brazil's next Arabica coffee harvest forecast has been tempered due in part to earlier weather challenges. This factor, and the recently rising Brazilian real, may push Arabica coffee prices higher in the near-term.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Steady	Good	Lower
Tomato Paste-Industrial (lb)	Steady	Good	Higher
Coffee lb ICE	Increasing	Good	Lower
Sugar lb ICE	Increasing	Ample	Higher
Cocoa mt ICE	Decreasing	Short	Higher
Orange Juice lb ICE	Increasing	Good	Lower
Honey (clover) lb	Increasing	Good	Lower

Produce

Market Overview

Celery is still in a very EXTREME situation. Smaller-sized lemons are also EXTREME. Strawberries are improving quickly.

MARKET ALERT

- **Avocados - ESCALATED**
- **Brussel Sprouts - EXTREME**
- **Cabbage (Red) – ESCALATED**
- **Celery – EXTREME**
- **Lemons (small sizes) -EXTREME**

WATCH LIST

- Sweet Potatoes and Yams
- Iceberg

Apples & Pears

Demand is strong for Golden Delicious and Granny Smith apples; 125- and 138-count storage supplies are limited. Washington Fuji, Gala, Granny Smith, and Red Delicious Apples are available. Braeburn and Honeycrisp volume has been depleted. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 14 to 18 Brix. The market is unchanged; supplies are sufficient. D'Anjou Pears are available, as well as Bosc stocks. Sugar levels range from 12 to 14 Brix. California Bartletts will hit the market in mid-July.

Artichokes

Supply industry-wide is fair. Demand is fair and prices are steady to higher.

Arugula

Supply and quality are good.

Asparagus

The market is low; supplies are ample in both regions. Mexican quality is best: tips are tight, stalks are firm, and flavor is pleasantly grassy.

Avocados

ESCALATED – Industry volumes are steady, and pricing continues to remain strong; we expect a stable market for the month of June. California volume has increased--with shippers chasing good quality fruit for retail programs--while Mexico nears the end of the crop with more grade 2s.

Bananas

Markets remain steady with consistent production and supply. Fruit quality is not an issue at this time.

Beans

EAST: Heat has pushed GA's crop ahead of schedule, which means things will wind down sooner than expected. However, Production has begun in NC & VA, so no gap in supply is expected. FOBs are slightly up with good quality available from new crop. GA's end of crop has been seeing some trouble spots.

WEST: We're coming into a period where there will be beans from a number of regions out west. Promotable supplies are not quite available yet, but there is enough to go around. FOBs are steady to slightly up with fair to good quality available.



Produce *(continued)*

Berries:
Blackberries
Prices are high. The Mexican season is nearly over. California production was delayed by rain but is finally getting started. Quality is very good: berries are deeply colored, juicy, and sweet. Sugar levels range from 12 to 13 Brix.

Blueberries
The market is weak; stocks are ample. Fruit is available in California, Central Florida, and Georgia. Quality is very good: fruit is plump and juicy. Sugar levels range from 12 to 16 Brix.

Raspberries
The market is starting to ease. The Mexican season is nearly over; California supplies are increasing now that weather has improved. Quality is very good: berries are plump and juicy with sweet flavor. Sugar levels range from 13 to 14 Brix.

Strawberries
Prices are easing. Supplies remain available in Santa Maria, but the bulk of MFC orders will be shipped out of the Salinas/Watsonville region now that volume has increased, and quality is improving.

Bok Choy
50# are in short supply and prices are up.

Broccoli
Prices have eased due to increased supplies. Quality is very good despite several weeks of inclement weather: mildew and yellow discoloration are occasional problems being culled in the field.

Brussels Sprouts
EXTREME: Very light availability. We are seeing EXTREME shortages in supply and the quality from Mexico is extremely challenging.

Cantaloupe
We are going on the California and Arizona Desert regions with descent volumes on the 12's and larger, light volumes on the 15's. The overall quality is very nice with good sugars and nice clean net. The brix has been 13-14 so fruit is eating well, and internal color is excellent with a tight cavity. The market is fairly strong due to cooler temperatures and volumes not coming off at a rapid rate. Weather is supposed to warm up next week and should see some better volumes.

Carrots
Supply and quality on carrots is good. Supply is now available in Georgia as well.

Cauliflower
Prices have eased. Despite recent inclement weather, stocks have increased. Quality is very good: slight discoloration, ricey texture, and uneven growth are occasional problems being culled in the field.

Celery
ESCALATED - Expect elevated markets and tight supplies for several weeks. Recent rain has caused quality concerns.

Cilantro
Supply is good and quality is fair.

Corn
Markets are down with good supply available on yellow, white and bi color out of Florida and the desert.

Cucumbers
EAST: GA's numbers have been good but yield and quality are starting to deteriorate due to heat and rain. New growing areas will begin to fire up very soon with eastern NC and NJ starting this week. FOBs are up as quality supply things slightly.
WEST: Mainland MX will continue for another 2-3 weeks but quality is declining the form of the fruit's shelf life being quite short. Fortunately, Otay is firing up and will increase throughout June. Quality has been strong out of Baja. FOBs are up as we skip through this quick transition.



Produce *(continued)*

Eggplant
EAST: it's still a rough go for eggs. Plant City has very few available and what is available is very poor quality. sunken areas, pitting etc. Georgia has begun in a very light way with volume expected to pick up in the next 10-14 days. FOBs are high, but steady. Look for this to change as Georgia picks up volume.
WEST: Very similar to the east, the west is also working through a transition period. Mainland MX is still going, but quality is very poor, and volumes are light. The CA desert has been off to a slow start with previous cooler temps, but looking at the forecast, things should improve as eggs thrive in heat and that's exactly what is in store. FOBs remain high, but steady. Look for this to change as more volume picks up out west.

English Cucumbers
There is a steady supply available from Florida, Mexico, and Canada.

Fennel
Supply on fennel will be short for the next few weeks due to frost damage and the Yuma season finishing with light supply. We will continue to see a majority of smaller fennel this week - 18s and 24s will remain limited.

Garlic
Supply is firming up and markets are active due to trade tariffs being imposed on products from China.

Ginger
Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Peru and Thailand.

Grapes
We have been struggling to get going out of Mexico and Coachella, but things are finally starting to get better as crossings have increased and the pipeline has started to get fuller, and prices are finally starting to ease and will continue to do so through the weekend and by next week should have plenty of fruit. The Mexico fruit has been fighting sugar, but weather has helped to bring it on. The overall quality of the fruit out of both regions is very clean, firm, and good color. The sugars will continue to get better in the next week to 10 days. The expected volume out of Mexico is 22 million compared to last year's crop at 14 million and they are about 2-weeks later than normal so we for sure will not have a gap when we transition to the Central valley around the 4th of July.

Green Cabbage
Supply is fair and quality is good.

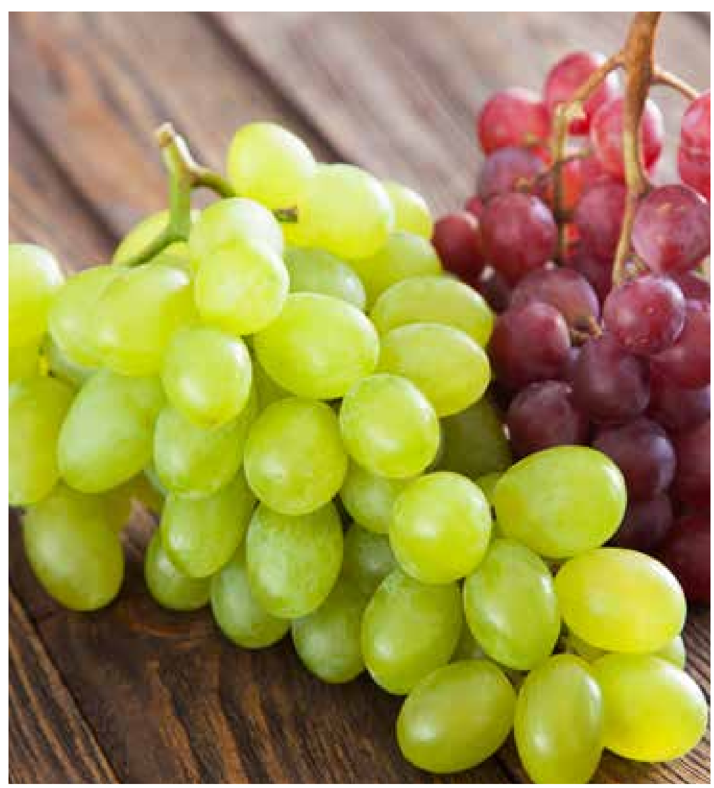
Red Cabbage
ESCALATED Supply continues to be light.

Green Onions
There is good supply and excellent quality from Mexico. The market is steady and will continue to be a bit sluggish, due to good volume.

Honeydew
Market is a bit softer than the Cantaloupe Market as we are harvesting in Mexico, Arizona and the Desert region of California. There are good supplies of 5's and 6's lighter supplies of the 8's. The overall quality out of all regions has been good with a clean and green to cream cast. The internal color and sugars look good as a well as a nice cavity. We are expecting to see good quality going forward through all these regions barring any major weather.

Jicama
Steady supply crossing through Texas.

Kale (green)
Supply and quality are fair.



Produce *(continued)*

Lemons
We are still picking some fruit out of Dist. 1(Central Valley) and have started to pick Dist. 2 (Coastal Regions) fruit, just primarily size picking to relieve the trees of some stress. We are peaking on the big sizes and 165's and smaller are very limited and market much stronger and will continue to see this heading into the summer due to all the rains, fruit has been growing and peaking on 95's,115's. The overall color is excellent as well as juice content. The moisture has also been creating spores in the fields as well and we will hope that it is not to extensive on the clear rot, but it is inevitable, and we are doing al we can to help slow the spores down in the field and in the packinghouse.

Lettuce:
Butter
Supply is good and quality is fair.

Green Leaf
Supply is slightly above normal. Quality is fair as we continue to see some occasional fringe burn. Demand is good.

Red Leaf
Supply is good, quality is fair.

Iceberg Lettuce
WATCH LIST Supply continues to be behind schedule due to cooler weather, but quality is good. The market last week started to get a little higher towards the end of the week, and this trend will continue. Anticipate higher prices due to lighter volume.

Romaine
Supply is slightly above normal. Quality issues such as mildew, fringe burn, and intern burn are still lingering.

Romaine Hearts
Supply for the week is above normal and will continue to be for the next couple of weeks. More rain is expected, and some quality issues may arise. Quality issues such as mildew, fringe burn, and intern burn are still lingering.

Limes
Prices have fallen; stocks are abundant with the exception of 110-count sizes, which are limited. Quality is very good: scarring and stylar end rot are minor issues.

Napa
Quality and supply are fair.

Onions
Texas, for all intent and purposes is finished as is the Imperial Valley. New Mexico is up and running but not all the sheds are in production yet, that should take about another 3-5 days. We had a very good season in So Cal and it looks like New Mexico will be a good one as well. The yellow market is pretty good right now and should hold its value for a while. Most of the Mexican onion crop is not crossing the border, this is helping the US market maintain its strength.

Oranges
We are still running navels, quality is a bit rough due to nearing the end of the season. You will see some soft fruit with puff and crease, also some clear rot due to all the moisture this season. We have also started some Valencia's and will continue through the summer, the overall crop volume is of normal size and peaking on 88's,113's. The overall quality of the Valencia's looks good now but fruit will have a tinge of green with good internal juice and sugars are 12-13 so eating good, and keep in mind they are a Valencia that has been on the tree for about 15 months.

Parsley(Curly, Italian)
Parsley has started to lighten up industry-wide this week. Supply and quality are both fair to good.

Green Bell Pepper
EAST: There is plenty of pepper in Georgia with excellent quality available. However, with the recent hot and rainy weather, we will see things decline rather quickly through the end of June. Eastern NC is looking to start in two weeks with additional scattered local deals firing up shortly after. FOBs remain low for now.
WEST: Coachella continues to produce good volume with excellent quality and volume. Nogales's volume is down, and quality is declining as well. FOBs are mostly steady for now but will most likely push upwards in the next couple of weeks as Nogales wraps up.



Produce *(continued)*

Jalapeños (Chiles)
EAST: There is a light but steady supply coming from Plant City. Georgia is still about 1-2 weeks away. FOBs are steady with good quality available.
WEST: We have 4 regions suppling Chiles right now (Sonora, Sinaloa, Baja & the CA Desert). There is good volume available. FOBs are steady to moving down on most. Some varieties have firmer pricing due to quality concerns, which are expected to last through June due to heat.

Red & Yellow Bell Pepper
EAST: Very limited volume is importing from Honduras. GA red may not mature fully due to the weather, so expect things to remain tight out east. FOBs are up slightly with fair to good quality available.
WEST: MX has reasonably good availability, but with the lighter supply in the east, demand is up. FOBs are up. Quality is mostly good.

Pineapple
Prices are stable; stocks are adequate. Quality is very good: fruit is juicy with tangy, sweet flavor. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes
We continue to see this carton market inch its way up a little at a time. Idaho has seen market strength in 80cts and larger and that should continue through this month.

Radishes
Markets are firming up due to heavy precipitation and wind damage to fields.

Salad Blends
The market is steady; supplies are tightening. Quality is fair. Inspectors are closely monitoring finished cartons for chunks and cores to achieve the best packs.

Sugar Snap Peas
Supply is tight, quality is good, volume should be coming on next week.

Snow Peas
Fields have shut down due to the recent market pricing. Volume is extremely limited.

Spinach (Bunched)
Supply and quality are good.

Spinach (Baby)
Supply and quality are good.

Spring Mix
Prices are unchanged; stocks are sufficient. Weather has improved, aiding quality.

Sweet Potatoes and Yams
WATCH LIST The sweet potato market continues to be tight after many growers were affected by Hurricane Florence in North Carolina last September. Increasing demand and heavy rains in Mississippi Louisiana, Arkansas and Alabama also created challenges for the other major growing regions but luckily, quality and size is still good. We will continue to see the price of sweet potatoes rise month by month over the summer until we get to next seasons harvest.

Yellow Squash/Zucchini
EAST: Supply is down as GA is past their peak picks. Quality from this area is subpar with heavy scuffing. We are approaching the time of year were supply is extremely fragmented all over the east. 5 states have already started in addition to GA, with more coming on board in the upcoming weeks. FOBs are up to account for the light supply and fair quality.
WEST: The better-quality squash is coming from the CA region where warm weather will bring on the crop in the next few days. Until then, there is limited supply available for good quality fruit. FOBs are up.



Produce *(continued)*

TOMATOES

EAST
Rounds
This will most likely be the last week of picks from Ruskin/ Palmetto. Mixes of rain and heat are resulting in subpar quality. If purchasing from this area, be aware of what to expect upon arrival. South Carolina is starting up with Quincy/South Georgia still a couple weeks out. FOBs are up as we cling to our South Carolina crop to carry the demand of the east. No flushes are expected anytime soon. Early reports from the fields in SC are that quality is very nice, but with rain in the forecast we may see this quickly change.

Romas
Availability will be very light in the easy for the next 4 weeks or so. Palmetto is wrapped up and Quincy's volume is extremely light. Things will be tight until scattered local deals fire up around the 4th of July. Romas are in the hands of few, putting big upward pressure on FOBs. Quality for what is available is mostly good, but there are still a few lingering lots of tired old crop.

Grapes
Grape numbers in Florida are very weak, as the heat and rain have really taken a toll on the late picks. Quality is very mixed with very low pack out yields. Buyer beware of the "deal." Meanwhile both South Carolina and Quincy have begun to harvest. Numbers are expected to be low from the initial crops, but quality is improved. Thus leaving us with a very split market for grapes. Again, beware of the cheap price and expect a lower tier quality. Better quality demands a higher price point.

Cherries
Yields have been up and down over the weeks, but similar to grapes, yields are a little light through the transition. FOBs are moving up with good quality available.

WEST/MEXICO
Rounds
The west is mostly a vine ripe program with very little mature greens available from SoCal.. Mainland MX's volume and quality continue to decline, putting pressure on new crop to perform with their limited volume. New crop eastern MX & Baja still have lower volumes and are leaning heavier on big fruit sizes. All this being said, FOBs are moving upwards. Quality is split with poor to fair from Mainland, and good to excellent from eastern regions.

Romas
Mainland's numbers are deteriorating quickly with Eastern MX & Baja not quite full steam. Thus, creating a pocket of tight supplies. FOBs are up significantly. Quality from old crop is poor while new crop is good.

Grapes/Cherries
Western demand is looking to Baja for grapes as Mainland and Nogales are just about done. Quality is much better on new crops with FOBs about steady week over week.

Tree Fruit
California nectarines and peaches are now on the market. Plums will become available next week. Quality is very good: sugar levels range from 10 to 11, but will increase as the seasons progress.

Watermelons
The market is low. Volume is high in California, Florida, Georgia, and Texas; the Mexican season is winding down. Quality is very good: fruit is juicy and bright red. Sugar levels are rising.