



MARKET TRENDS

FOR WEEK ENDING NOVEMBER 3, 2017



MARKET TRENDS

NOVEMBER 3, 2017

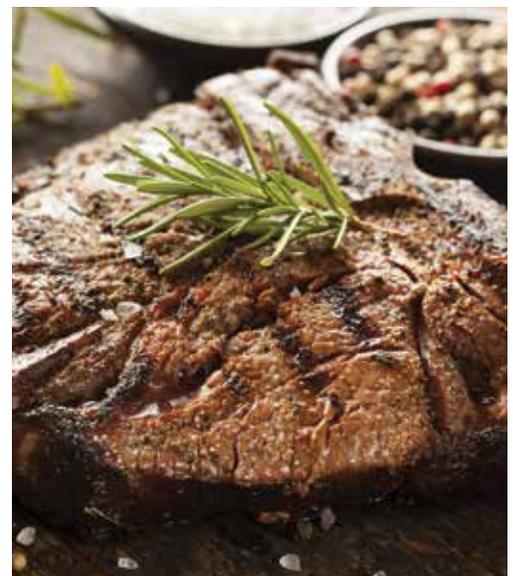
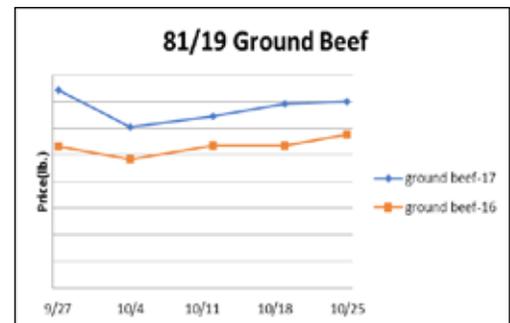
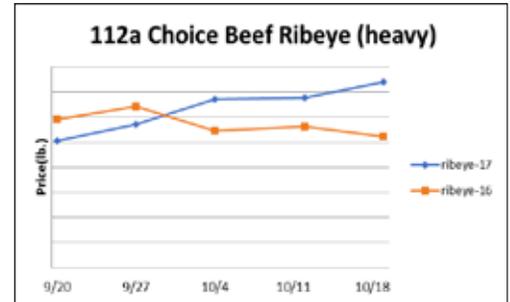
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Beef output last week rose 1.4% and was 3.3% larger than the same week last year. Solid year over year gains in beef production are expected to persist this fall and at times in 2018. The October 1st cattle on feed inventory was 5.4% larger than last year and the biggest for the date since 2012. Cattle placements into feedlots during September were 13.5% more than 2016 at an average weight slightly below last year. Cattle placements into feedlots have been higher versus the prior year for seven consecutive months by an average of 10%. Forward sales of ribeyes and tenderloins are becoming more expensive at a 10% premium to the spot. Higher spot prices are likely later this fall.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Decreasing	Short	Higher
Ground Beef 81/19	Increasing	Good	Higher
Ground Chuck	Increasing	Good	Higher
109 Export Rib (ch)	Increasing	Good	Higher
109 Export Rib (pr)	Decreasing	Good	Higher
112a Ribeye (ch)	Increasing	Good	Higher
112a Ribeye (pr)	Decreasing	Good	Higher
114a Chuck , Shlder Cld(ch)	Decreasing	Good	Higher
116 Chuck (sel)	Decreasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Lower
116b Chuck Tender (ch)	Increasing	Good	Higher
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Increasing	Good	Higher
121c Outside Skirt (ch/sel)	Increasing	Good	Lower
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Increasing	Good	Higher
167a Knuckle, Trimmed (ch)	Increasing	Good	Higher
168 Inside Round (ch)	Increasing	Good	Higher
169 Top Round (ch)	Decreasing	Good	Higher
171b Outside Round (ch)	Increasing	Good	Lower
174 Short Loin (ch Ox1)	Decreasing	Good	Higher
174 Short Loin (pr 2x3)	Decreasing	Good	Lower
180 Ox1 Strip (ch)	Increasing	Good	Higher
180 Ox1 Strip (pr)	Decreasing	Good	Lower
184 Top Butt, boneless (ch)	Increasing	Good	Lower
184 Top Butt, boneless (pr)	Increasing	Good	Lower
184-3 Top Butt, bnls (ch)	Increasing	Good	Higher
185a Sirloin Flap (ch)	Increasing	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	Higher
193 Flank Steak (ch)	Decreasing	Good	Lower
50% Trimmings	Increasing	Good	Higher
65% Trimmings	Increasing	Good	Higher
75% Trimmings	Decreasing	Good	Higher
85% Trimmings	Increasing	Short	Higher
90% Trimmings	Increasing	Short	Higher
90% Imported Beef (frz)	Decreasing	Good	Higher
95% Imported Beef (frz)	Decreasing	Good	Higher
Veal Rack (Hotel 7 rib)	Steady	Good	Lower
Veal Top Round (cap off)	Steady	Good	Lower



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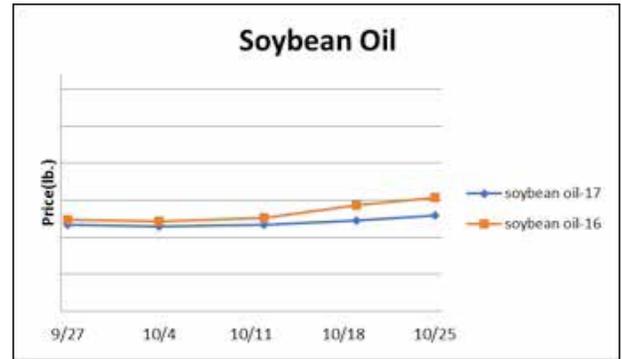
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Grains

The 2018-19 domestic winter wheat planting season is progressing but remains modestly behind due in part to the lateness of the corn and soybean harvests. Soil moisture conditions are favorable for the winter wheat crop but the weather in Q1 2018 is more important. Wheat prices could remain sideways in the near term.

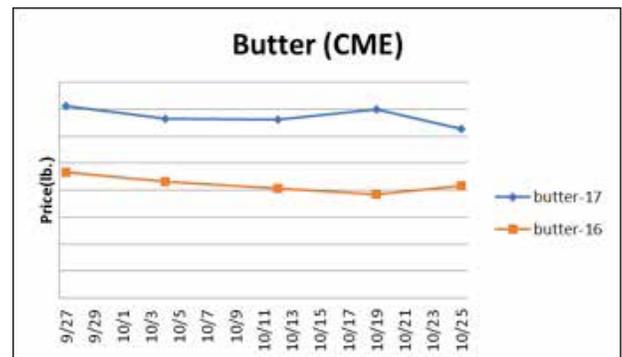
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Increasing	Good	Lower
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Lower
Distillers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



Dairy

Milk farmers are slowing growth which is not unexpected given the lackluster cheese and nonfat dry milk prices for next summer. During September, U.S. milk production was just 1.1% larger than last year due to a .8% bigger milk cow herd and a .3% gain in milk per cow yields. Total year over year milk production expansion as well as milk per cow yield growth were both the smallest since the winter of 2016. Further, farmers reduced the herd by 4,000 head marking the biggest reduction in 20 months. Further curbed milk output growth could be supportive of dairy prices at times in 2018.

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



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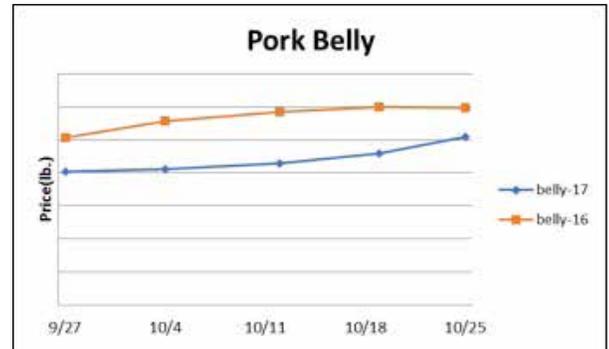
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Pork

Pork production last week fell 1.3% and was 1.6% less than the same week a year ago. Slaughter fell to a five-week low. Ample hog supplies should fuel solid year over year gains in pork output during the next several weeks. Pork exports during August were .8% less than the previous year but the second highest for the month on record. U.S. pork shipments were down to China, Hong Kong, and all of Asia. Stronger pork exports are anticipated by the USDA in 2018 which could be supportive of the markets.

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



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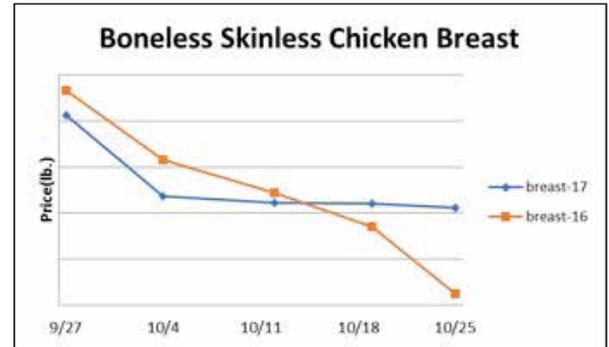
PERFORMANCE
FOODSERVICE



Poultry

Chicken output for the week ending October 14th rose 1.5% from the prior week and was 8% larger than the same week last year when production was interrupted by Hurricane Matthew. Respectable year over year gains in chicken output are anticipated throughout the fall which could weigh on the markets. However, annual chicken production growth during the winter is forecasted at just 1.6% which could be supportive of the wing markets. The ARA Chicken Wing Index has averaged above October in the following February in nine of the last eleven years by an average of \$.11 lb. Chicken tender prices have fallen 29% since peaking during the summer. History suggests there may be more downside potential in the chicken tender markets.

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

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	Decreasing	Short	Higher
Liquid Egg Yolks	Increasing	Short	Higher
Egg Breaker Stock Central	Decreasing	Short	Higher



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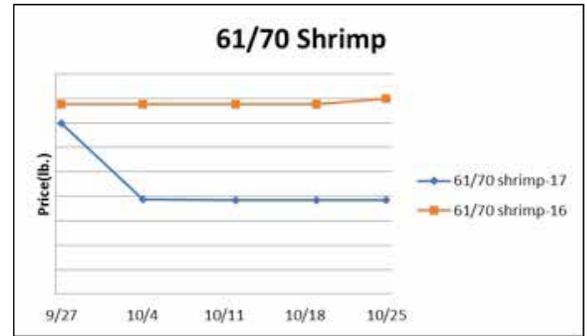
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Seafood

During August the U.S. imported 7.7% less snow crab than the previous year due mostly to tight world supplies. The domestic Bering Sea snow crab harvest season is underway, but the quota has been slashed to a decade plus low. Thus, fairly tight snow crab supplies are anticipated to persist deep into 2018 which may underpin the snow crab markets here and abroad.

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	Lower
Pollock Filet, Alaska, frz	Steady	Good	Lower



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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	Higher
PP-HIGP-heavy grade utensils	Steady	Good	Higher
PE-LLD-can liners, film, bags	Steady	Good	Higher

Retail Price Change from Prior Month

Description	Aug '17	Jul '17	Jun '17
Beef and Veal	Decreasing	Increasing	Increasing
Dairy	Increasing	Increasing	Decreasing
Pork	Increasing	Increasing	Increasing
Chicken	Increasing	Increasing	Increasing
Fresh Fish and Seafood	Increasing	Decreasing	Increasing
Fresh Fruits and Vegetables	Increasing	Increasing	Decreasing

Various Markets

The U.S. tomato for processing harvest is winding down but is somewhat of a disappointing harvest. Total California output is projected to be roughly 10% smaller than the previous year due to smaller acreage. This could be supportive of canned tomato prices this fall.

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



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Produce

The tomato markets have been fairly steady during the last several weeks as the Northern crop harvests wind down. Florida will account for the biggest part of domestic tomato output during the next few months and production is expected to be erratic. Hurricane Irma back in September caused notable damage to crops and this should impact domestic tomato supplies especially during the late fall. Higher tomato prices are anticipated in the coming weeks. Lettuce prices remain elevated as the crops transition south on the West Coast. Some lettuce price relief is anticipated later this fall. We are seeing a lot of improvement in lettuce, romaine and leaf items. Oranges and carrots will remain in short supply. Transition is right around the corner. Iceberg, romaine and leaf will transition in the beginning of November, and broccoli and cauliflower will be closer to December.

Eastern and Western Vegetables

HURRICANE IRMA UPDATE: We will see a very active market and potential supply interruptions on all east coast vegetable items due to the aftermath of Hurricane Irma. Several of our partner growers have sustained severe damage to infrastructure, as well as crops. Fortunately, the forecast calls for favorable weather in the region over the next several days, which will assist in the recovery process. We expect to see very active markets over the next two to three months due to the damage of the fall crops in North Florida and South Georgia. We are anticipating a bold recovery in the Immokalee and Naples area in the next 4 to 6 weeks barring no additional severe weather events.

Tomatoes - East

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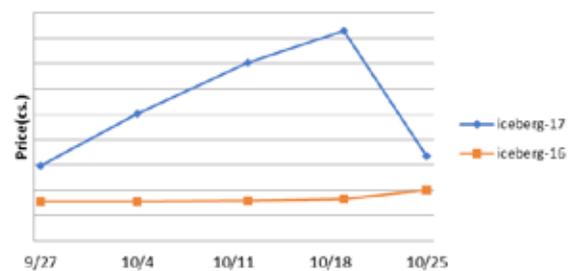
Tomatoes - West And Mexico

WEST COAST WEATHER STATEMENT: Last week California experienced severe weather including rain, high humidity and wind. Combine these events with several heat waves over the past several weeks, and it does not impact crops in a positive manner. We are seeing heavy bloom drop and damage to fruit maturing on the plants. We expect an early completion of the tomato and squash season in the west adding additional concerns for shortages of supply over the next few months as Florida begins to recover from Irma.

MARKET ALERT

- **Broccoli /Broccoli Florets – ESCALATED**
- **Carrots – EXTREME**
- **Green Beans – EXTREME**
- **Melons (Honeydew & Cantaloupe) – ESCALATED**
- **Mushrooms – ESCALATED**
- **Oranges – EXTREME**
- **Onions – ESCALATED**
- **SNOW & SUGAR SNAP PEAS – ESCALATED**
- **Grape & Cherry Tomatoes – ESCALATED**

Iceberg Lettuce (24 count)



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Produce

Apples & Pears

The market is level. The California Granny Smith and Fuji apple seasons have concluded. Washington Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are readily available. Packer label Honeycrisp and Braeburn apples are also on the market. Brix levels range from 14-18. The Pear market is unchanged. The California Bartlett season has ended.

Artichokes

Steady market with higher prices. Quality is good.

Arugula

Supplies are low for baby and wild. Quality is fair. Prices are rising.

Asparagus

Prices are low; stocks are abundant. Quality is very good: stalks are straight, tips are tight, and flavor is pleasantly grassy.

Avocados

The market is steady. Production is at full speed in Mexico. Chilean shipments remain limited.

Bananas

Demand and quality are good and inventories are unchanged this week.

Beans

East: FOBs are still extremely high and will continue to rise for the next 2-3 weeks. GA continues to produce poor quality product. Supplies will be touch and go until Plant City, FL begins around the 12th of November.

West: Brentwood being the primary supplier does not have enough supply to cover needs. The desert was delayed and is now expected to be on or around 11/1. In addition, mainland MX had a quick heat spell, which could affect the crop coming on board 11/10. This could pose hazard on future quality for around the Thanksgiving holiday.

Berries:

Blackberries

Prices are elevated; volume is extremely low. Mexican supplies are tight, yet beginning to increase. Quality is average: softness is an issue due to erratic temperatures. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is high. Growers are shipping from countries in South America. Volume will rise through November. Quality is good: berries are plump, juicy, and sweet.

Raspberries

The market is weak. California volume is high; Mexican stocks are sufficient. Quality is good: color is deep red and flavor is tangy, yet sweet. Sugar levels range from 13 to 14 Brix.

Strawberries

Prices are up. The Santa Maria growing region is expecting unseasonably hot weather that will decrease size as well as cause soft texture and bruising.

Bok Choy

Quality is good and we are seeing some higher quotes on WGA cartons.

Broccoli

Good color and occasional brown bead. Quality has gotten much better. Prices remain elevated. Quality is best in California: uneven size is a minor problem.

Brussels Sprouts

Very high prices and tighter supplies remain but are leveling out. Quality is improving.

Cantaloupe

Market very strong demand exceeds supply in the desert. The overall quality is very nice, fruit is firm and clean with a nice clean net, and overall just a very nice opening box. We have had some cooler temperatures which has helped to firm up the fruit and fruit is eating excellent we are peaking on 9's getting very few smaller. We will have fruit going forward here through November out of the desert region.



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Produce *(continued)*

Carrots

EXTREME Due to the heat and rain, we are seeing some quality issues and a shortage on jumbo supplies as well as tables and cellos.

Cauliflower

Expect erratic prices until the industry moves to Arizona for the fall/winter season in November. Quality is average: heads are firm and snowy white.

Celery

Some slightly dehydrated and occasional flag and pith. Quality is just okay. The market is weak, yet expected to start rising. Production is transitioning from the Salinas Valley to Oxnard, California and Yuma, Arizona. Demand will ramp up for the Thanksgiving holiday.

Cilantro

Still seeing some burn and occasional decay. Overall getting better.

Corn

Volumes are declining in all markets; however, demand is flat. The market is mostly unchanged, and quality is still good on yellow, white and bicolor.

Cucumbers

East: Price points moving up just a couple of dollars as weather in GA has affected supply. Quality varies in the GA area from shipper to shipper. Most issues are in the form of shorter shelf life.

West: With Nogales being the primary area, supplies are a little lighter than usual. This is driving prices up. Some cucumbers are trickling in from Baja, however there is not enough supply right now to cover the demand. Quality from both areas is great.

English Cucumber

Supplies are very tight and expected to remain this way until greenhouse production in Mexico ramps up over the next 10 to 14 days. Markets will remain firm this week.

Eggplant

East: Less supply is driving pricing up as NC & SC start to taper off. Quality overall is good, however, some reports of disease in GA are showing some brown calyx.

West: Supplies are improving from the desert as Fresno wraps up. FOBs are staying flat and firm through the transition period. Look for Nogales to begin in mid-November for relief. Quality is good at this time.

Fennel

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

Garlic

We just finished our 2017 harvest this week. We have fortunately harvested our most normal crop since 2014. Our yields were pretty much as expected, nothing extraordinary, but a good crop of garlic. Presently, demand for domestic garlic still exceeds supply.

Ginger

Chinese ginger supplies have tightened up putting upward pressure on prices across the country. This is still a better dollar value than ginger from Hawaii, Brazil, Thailand and Costa Rica.

Grapes

We are still harvesting here in the central San Joaquin Valley and we will be harvesting grapes here through November barring any major weather issues. The overall crop looks very good with a nice set and some very nice quality. We are seeing some burn due to the extreme heat we have been experiencing in some vineyards but at this point it looks to be minimal damage. We did also get some sporadic rain last week, we have assessed the damage and there is some fruit in the southern region near Bakersfield that did get up to 2 inches of rain and there are some vineyards that are not going to get harvested due to the damage. Overall it looks like it was just isolated areas that were hurt. We are harvesting a few different varieties (Sugarone, Ivory, Princess, Green Globe, Autumn King) of green grapes now and all look excellent with good sugar and very clean and green, the reds we are harvesting are (Scarlett Royals, Crimson, Timco, Alisons and Magentas).



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Produce *(continued)*

Green Cabbage

Supply is good on both coasts, quality is good.

Red Cabbage

Quality and sizing have been great with good color. Market is stable.

Green Onions

Iced Prices are average, quality is poor with heat related damage. Iceless This market is steady and we are seeing heat related quality issues.

Honeydew

Market is strong and we have finished here on the Westside as demand is excellent, we have started in a light way in the desert and should have better volumes in the coming week, demand has been exceeding supply. The overall quality is fair to good with excellent sugars and a nice clean green to cream cast, with internal color nice and nice tight cavity. We will have fruit out of the desert through November as well.

Jicama

Normal prices and quality is good.

Kale (Green)

Demand is steady and quality is just fair. Supplies are starting to lighten up with product being affected by heat damage.

Kiwi

Shipments are for the most part finished out of Chile. What is in storage will be it for the season. Still looking for California to begin harvesting over the next several weeks. Markets remain very active with limited availability on the horizon. Quality is still very nice.

Lemons

We have finished our Mexico fruit and are done on Chilean and are going with good numbers out of Dist. 3 (Desert) fruit is midsized peaking on 140's, 165's followed by 115's. The overall quality is good and also gassing this fruit 3-5 days which will cause some spotting and some checkerboard color in the box. We have a lighter than normal crop in dist. 3 about 15%-but we are getting a little later start than normal so supplies will be good. We are planning on starting our dist. 1 fruit around mid to late November as well and that will carry us through May.

Lettuce:

Butter

Prices are stable. Quality is average due to the heat.

Iceberg

Light weights and misshapen. A large amount of mechanical damaged lettuce. Seeder is also an issue. Overall quality is getting better but light weights.

Romaine

Some wind burn and occasional fringe burn. Some fields have seeder. Prices are elevated. Expect limited stocks through the harvesting transition from Salinas and Huron to Yuma in November.

Romaine Hearts

Occasional fringe burn and some seeder. Supplies are average and prices have improved.

Green Leaf

Very few issues, good quality.

Iceberg Blends

Weak tip and seeder are an issue. The market has stabilized. Head weights will be lower than normal until growers move production from the Salinas Valley to the Yuma growing area in November.

Chopped Romaine/Romaine Blends

Fringe burn has lessened. Darker green color which adds to bruising. Quality is good.

Harvest Blend

Seeing some insect damage and occasional burn. Generally good quality.

Limes

Prices are stable; supply is meeting demand. Quality is very good: blanching is an occasional problem.

Napa

Supplies are normal. Quality is good.



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Produce *(continued)*

Onions

Growers in Washington, Oregon, Idaho are all very bullish this season. There have been challenges with getting the product out of the ground and into the sheds in Idaho/Oregon.

Typically growers try to finish by the 15th of October. It is now the 25th of the Month and there is still significant acreage out in the fields. There is concern about higher cull rates than normal resulting from eventual freeze damage. Washington appears to be in better shape as their crop is fully harvested and stored, and their yields seem to be better than they are in Idaho. Large size onions (Colossal and Super Colossal) will be short all season and should demand a premium. We anticipate seeing the market start to move in the next few weeks once Idaho/Oregon are fully stored and they can assess what the crop looks like. Red onions are believed to be the shortest this season of all the colors.

Oranges

We have started navels in a light way and should be getting into some better volume in the coming week and by the first week of November should be in full swing. This year's crop as we have mentioned in the past is about 20% lighter than last year, therefore we will see larger size fruit through the year. The first of this fruit is peaking on 88's followed by 113's and then 72's on the early Fukomotos, which typically we are peaking on 113's and 138's. The fruit has at least 120 hours of gas on the fruit so you will see green spotting and checkerboard color through the box. The fruit is actually testing 11-12 brix which is very good for this time of the year. Our Temperatures will be cooling down to the low 70's high and 40's at night, with that fluctuation in temperature that will really help the color, but we will be gassing fruit for at least another 4- 5 weeks to color up the fruit fully.

Parsley (Curly, Italian)

We are seeing prices that are still higher, the warm temperatures have caused quality issues.

Green Bell Pepper

East: A little activity in the marketplace as GA experienced some weather the last week. However, there is still quite a bit of pepper in the market place, with large size being the hardest to come by. Prices are up about \$2-4. Quality is weakening and looking only fair to good.

West: The west is making a transition from the coastal region to the desert, thus strengthening price points. The desert is off to a slower start than expected. Look for a price increase of about \$4-6 and some quality issues presenting themselves, especially in the older crops.

Jalapeño Pepper

East: GA is harvesting a good and steady crop. Prices have fallen back down slightly and leveled off. Quality continues to look good.

West: Baja supplies are improving, but not where they need to be. Prices remain a little higher than usual but are steady week over week. Quality from Baja is excellent. Relief is expected in about 7-10 days once Sonora gets fired up with Sinaloa to follow shortly after.

Red & Yellow Pepper

The market is climbing. East Coast stocks remain tight. Expect limited West Coast supplies for the next month as California production moves to Mexico. Quality is very good: skins are smooth, color is bright, and flavor is sweet, yet spicy.

Pineapple

Prices are low. Volume is high; large sizes are especially ample. Quality is very good: fruit is juicy and tangy, yet sweet. Sugar levels vary from 13 to 16 Brix.

Idaho Potatoes

We are seeing a shortage of small potatoes on the Eastern side of the state, with both Norkotahs and Burbanks sizing larger than usual. 40-70ct are plentiful, and 80ct and smaller are already commanding a premium. We are expecting this situation to continue into the season as well. Currently demanding is exceeding supply on these sizes, and as we get into Thanksgiving ads for consumer potatoes, we expect some truckload deals available on large size cartons, in order to generate the supply for retail. There is some concern of higher cull rates as well resulting from freeze damage due to delayed harvest.



MARKET TRENDS

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Produce *(continued)*

Radishes

Quality is good and supply is slowing down. Expect to see stronger markets through the summer.

Snow and Sugar Snap Peas

ESCALATED Snow and sugar snap peas are in high demand and markets are extremely tight.

Spinach (Bunched)

Supply is average and quality is poor due to heat-related issues. Prices are better.

Spinach (Baby)

Baby and clipped spinach supplies are average. Quality is poor due to heat-related issues and occasional reports of mildew. Prices are somewhat up.

Spring Mix

Prices are level. Quality is good: mildew is damaging some red leaf and red oak lots. Breakdown is also an occasional problem throughout the industry.

Yellow Squash / Zucchini

East: Yellow continues to have a little lighter supply versus zucchini due to lighter plantings, however, still good supplies available. Quality overall has been good, however, still some reports of scarring on yellow. Pricing is steady.

West: Most supply is coming from the Nogales area at the time. Quality is excellent and prices remain unchanged. However, a transition period is in the forecast for mid-November, and while we don't anticipate a supply gap, there could be some activity in regards to price points at that time.



Tomatoes

East

Rounds

TN has finished their season while few tomatoes trickle in from other eastern areas with very light volume. Demand remains low, therefore FOBs tend to stay depressed. Quality has been good recently, despite being the tail end of the crop. As we turn to Quincy & Palmetto/Ruskin, crop yields are expected to be low and come and go around the first week of November. At this time, quality is expected to be good. Look for prices to begin increasing around the first week of November as the western crop declines.

Romas

Similar to the rounds, pickings are becoming scarcer, resulting in light yields. However, demand is still low, therefore FOBs are staying fairly flat moving into the next week. Quality is fair to good. Quincy & Palmetto/Ruskin, yields continue to be lower than normal for this time of year. The good news is quality is shaping up and looking better.

Grapes

As majority of growers have finished their fall season, the new production areas haven't quite caught up with demand yet. Thus, grapes have increased another few dollars as we move into next week. Quality is mostly good.

Cherries

Cherry demand remains steady with prices staying firm. There is some price variance which can potentially relate to quality issues on the lower price point product.

West/Mexico

Rounds

With only about 7-10 days left in the California season, only about 4 major players remain in the game. Each grower expects to be done with their season by the middle of next week. Demand and prices both remain low, with a little upward pressure as supply tapers off. Expect by middle to end of next week to see pricing push upward a few dollars. MX vine ripens are crossing steadily, however, supplies are expecting to tighten up as CA ends and FL is off to a rocky start. Quality from the end of the CA crop is generally good considering the pressure the crop has been under.

Romas

Most growers have finished their summer season and demand is turning to Baja & Eastern MX. These areas are experiencing good crop supplies and quality is parring up to be pretty good. Some romas are crossing through the TX region and quality from there looks strong as well.

MARKET TRENDS

NOVEMBER 3, 2017

PERFORMANCE
FOODSERVICE



Produce

Grapes

We have reached a very tight market and extreme supply gap as Eastern MX & Baja produce very light supplies. Prices are quickly rising by the hour. Expect a \$10+ increase. Quality, for what is available, is good.

Cherries

Continuous light supplies from the region are keeping the cherry market higher than usual at a firm and steady price point. Quality is mostly good.

Tree Fruit

Prices remain high. The California black plum, peach, and nectarine seasons are over. Red plums will remain on the market through this week. Expect a harvesting gap before the offshore season begins. Quality is average: sugar levels vary from 14 to 16 Brix.

Watermelons

The market is stable; supplies are increasing, especially from Mexico. Quality ranges from good to very good: sugar levels average 11 Brix.

