MARKET TRENDS

FOR WEEK ENDING NOVEMBER 24, 2017

PERFORMANCE FOODSERVICE

MARKET TRENDS

NOVEMBER 24, 2017

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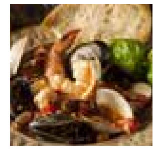
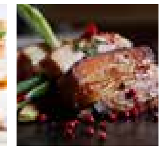
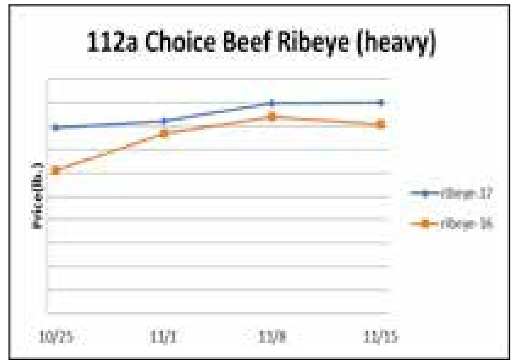


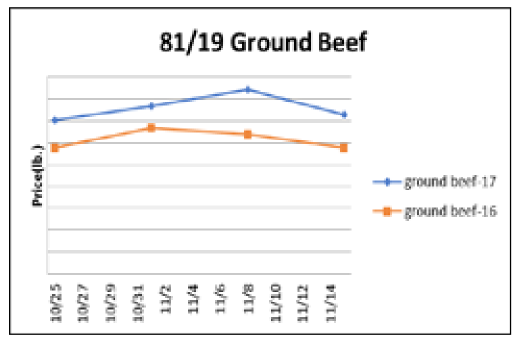


Beef, Veal & Lamb

Beef production last week fell 2.8% and was .6% less than the same week last year. 2017 to date beef output stands at 3.9% better than the previous year. Cattle slaughter last week was the smallest for any non-holiday week since July. Year-over-year gains in beef production are expected to abate during the winter. Overall beef demand has softened with the recent price increases. Spot beef shipments last week were the smallest for any non-holiday week since May. Further, forward beef sales continue to trend below last year. Beef ribeye and tenderloin prices may still rise during the next few weeks, however, as solid demand continues for those cuts for the holidays.

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





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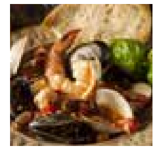
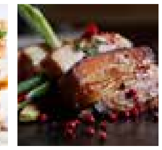
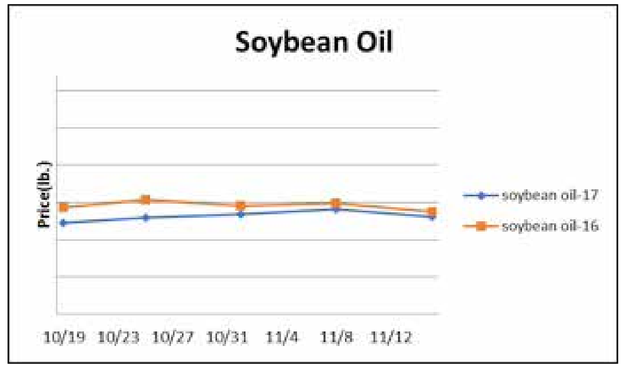




Grains

The soybean oil markets have turned lower this week as the industry tries to ascertain expectations around soybean oil use for biodiesel for 2018. Expanding world palm oil output is influencing prices downward as well. The food oil markets could see more downside in the near term but are likely to rebound this winter.

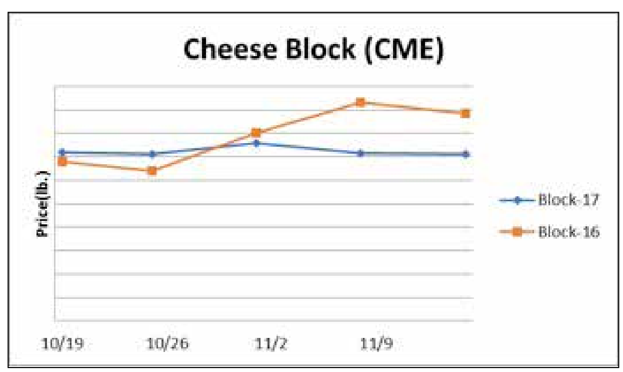
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Lower
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Lower
Distillers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



Dairy

The CME cheese markets have been supported by solid exports and good holiday demand. However, seasonal buying is starting to waver which should influence CME cheese prices lower. The upside may be limited during the next several months as well due to continued low nonfat dry milk prices. October 1st domestic nonfat dry milk holdings were 49% larger than the prior year and a record. Further, stocks expanded during September for only the second time since 2000. The butter market could move lower in the coming weeks, but the downside is likely only modest.

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



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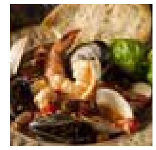
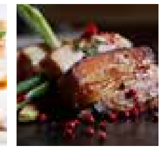
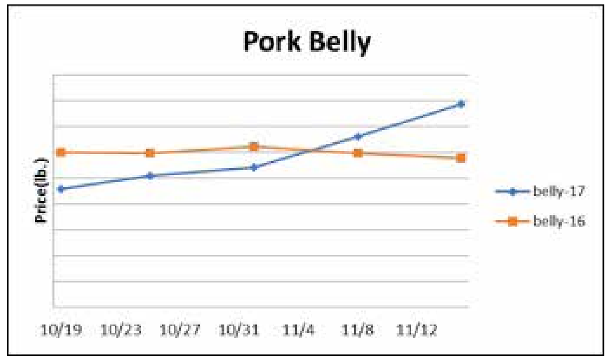




Pork

Pork output last week rose 2.2% and was 1.1% larger than the same week a year ago. Year to date weekly pork production is up 2.4% from 2016. Strong year-over-year gains in pork output are anticipated this winter. The USDA is forecasting Q1 2018 pork production to be 4.7% bigger than this year. This could limit any seasonal upside in the pork markets. Pork belly prices have been on the rise as the earlier low markets incited additional demand. But, history suggests that the belly markets could move downward in the near term.

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



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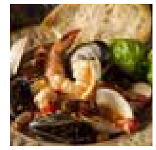
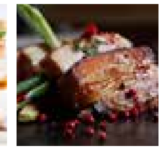
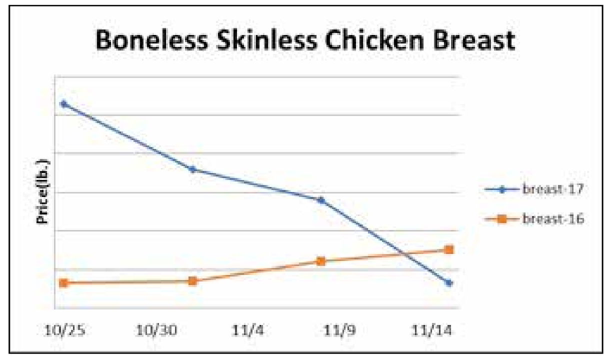




Poultry

For the week ending November 4th, chicken production rose .4% from the prior week and was 4.6% larger than the same week last year. The six-week total for chicken output stands at 2.3% better than 2016. This is despite the average broiler weight tracking .6% lighter. The chicken wing markets have fallen during the last month. However, they are still trading at their most expensive levels for mid-November on record. Chicken wing demand should escalate in January. This could be accompanied with tempered annual chicken output gains. These factors should be supportive of the chicken wing markets during the early winter. A decline in the number of table egg laying hens may be especially supportive of egg prices this holiday season.

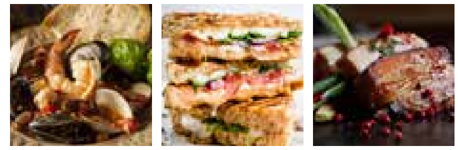
Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Decreasing	Good	Higher
Wings (jumbo cut)	Decreasing	Good	Lower
Wing Index (ARA)	Decreasing	Good	Higher
Breast, Bnless Skinless NE	Decreasing	Good	Higher
Breast, Bnless Skinless SE	Decreasing	Good	Lower
Breast Boneless Index (ARA)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



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

Eggs

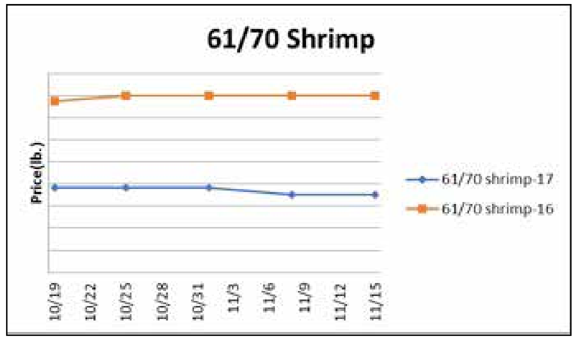
Description	Market Trend	Supplies	Price vs. Last Year
Large Eggs (dozen)	Increasing	Short	Higher
Medium Eggs (dozen)	Increasing	Short	Higher
Liquid Whole Eggs	Steady	Short	Higher
Liquid Egg Whites	Increasing	Short	Higher
Liquid Egg Yolks	Increasing	Short	Higher
Egg Breaker Stock Central	Increasing	Short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

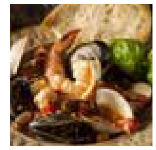


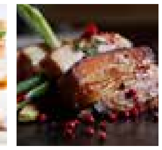
Seafood

The shrimp markets have been tracking below 2016 levels in recent months. This is due in part to solid U.S. shrimp imports. During September, the U.S. imported 13.9% more shrimp than the previous year, marking the biggest imports for the month since at least 2008. A firm dollar should help imports moving forward which could limit the upside in 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	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







Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
WOOD PULP (PAPER)			
NBSK- Paper napkin	Increasing	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

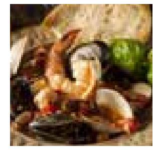
Retail Price Change from Prior Month

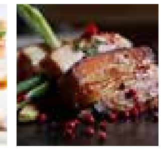
Description	Sept '17	Aug '17	Jul '17
Beef and Veal	Decreasing	Decreasing	Decreasing
Dairy	Increasing	Increasing	Increasing
Pork	Decreasing	Increasing	Increasing
Chicken	Increasing	Decreasing	Increasing
Fresh Fish and Seafood	Decreasing	Decreasing	Increasing
Fresh Fruits and Vegetables	Increasing	Decreasing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

Various Markets

The coffee market has been range-bound since late September mostly trading between $1.25 and $1.35 per/lb. Some improvement in coffee supplies is anticipated with the new harvests. Further, the Brazilian Real is likely to remain deflated. The upside may be limited in coffee prices this winter.

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





Produce

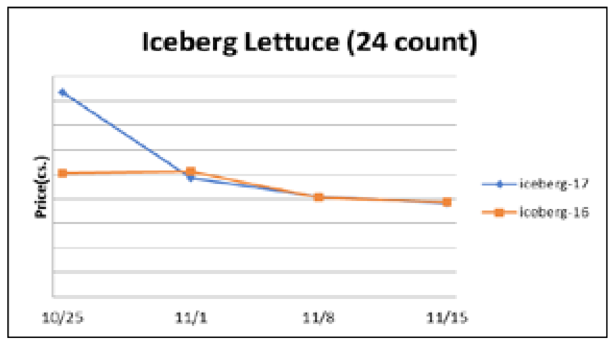
The Idaho potato markets have firmed in recent weeks which is along seasonal patterns. The fall potato harvest season is winding down with fairly disappointing results. The USDA is forecasting the 2017 U.S. fall potato harvest at 398.9 million hundredweight which is 1.9% less than the prior crop and the smallest since 2013. This could be supportive of the potato markets during the next several months. The tomato markets remain firm due to shortened Florida supplies. Florida tomato shipments last week were about half of 2016. Lettuce, romaine and leaf items are steady and are still a good buy. Oranges and carrots will remain in short supply. Lemons are also in short supply again. Winter western veg transition is underway to yuma.

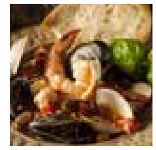
Tomato Weather Update – East, West and Mexico

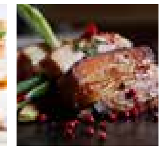
ESCALATED - As we transition into southern Florida for the fall and winter tomato programs, we are witnessing the situation we have all been aware was coming for some time now. On September 10, 2017, Hurricane Irma devastated several growing districts throughout Florida with winds over 100 miles an hour and catastrophic flooding. This weather event is currently impacting harvest of all vegetable items in the Ruskin/Palmetto region resulting in extreme yield deficits coming from the fields. In addition to this event in the east, we are seeing major issues on the horizon in the Baja with grape tomatoes and round tomatoes. In September and October, we saw major swings in temperatures that affected the bloom and pollination process causing very low production numbers. This, in addition to a shorter California season, has caused major shortages across the entire category.

MARKET ALERT

- **Carrots – EXTREME**
- **Green Beans – EXTREME**
- **Lemons – ESCALATED**
- **Mushrooms – ESCALATED**
- **Onions – ESCALATED**
- **Potatoes – ESCALATED**
- **SNOW & SUGAR SNAP PEAS – ESCALATED**
- **Tomatoes (Cherry, Grape & Round) – ESCALATED**







Produce

Apples & Pears
Prices are steady; new crop Washington stocks are ample. Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are on the market. This year's Granny Smith crop is dominated by small sizes. Packer label Braeburn, Envy, Honeycrisp, Opal, and Pacific Rose varieties are also available. Brix levels range from 14 to 18. Pears prices are stable; supplies are abundant, particularly 100- to 120-count sizes. Quality is very good: sugar levels range from 12 to 14 Brix.

Artichokes
Steady market with higher prices. Quality is good.

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

Asparagus
Good supply, prices are back to normal and quality is good.

Avocados
We are continuing to see higher volume crossing through Mexico which is pushing FOB prices down at the border. We still anticipate a stable market through December. Quality is very good and expect a shift over the next several weeks to larger-sized fruit.

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

Beans
East: There is still not enough to supply to meet demand, even though FL has begun. Look for relief after the holiday. Quality so far from FL has been good.

West: Quality continues to be an issue from Nogales. The desert only has light supplies which is keeping FOBs high. Look for pricing to fall slightly in about 7 days.

Berries:
Blueberries
Blueberry availability will be getting better with imports and other markets starting up. Quality is good.

Blackberries
Blackberries are average in volume. Quality is average to good.

Raspberries
Volume is light and quality is a little overripe.

Strawberries
The market is getting very active, with much higher prices. Salinas is done and we are now transitioning to Mexican berries and Oxnard. Once again prices are high, and we are seeing a shortage in supply.

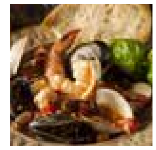
Bok Choy
Quality is good and we are seeing some higher quotes on WGA cartons.

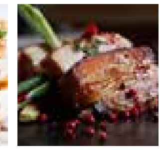
Broccoli / Broccoli Floret
Supplies are average. Quality is average with some heat damage. Prices are steady, and we anticipate this market being up and down for the next few weeks.

Brussels Sprouts
Very high prices and tighter supplies remain but are leveling out. Quality is improving. We expect improvement in about 2 to 3 weeks.

Cantaloupe
Arizona is anticipated to be in production for only one more week. Cantaloupe sizing is projected to have very heavy to smaller sizes which will leave 9ct lopes in very short supply.

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.





Produce *(continued)*

Cauliflower
Prices have come down from last week. We are seeing good quality and a steady supply.

Celery
We are starting to see prices rise. Supplies are bit lighter.

Cilantro
Quality is improving. Steady supply and good prices.

Corn
Sweet corn is very tight as Hurricane Irma has shown its effect. This shortage should last for at least two weeks with slight relief around the 20th of the month. One larger grower does not anticipate going until December 1st.

Cucumbers
East: FL is picking up and GA still has some supplies to move out. Prices are steady and quality is good from all areas.

West: Mainland MX is producing plentiful supplies. Prices are steady and quality remains good.

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

Eggplant
East: GA being the only grower in play, supplies are not enough to meet the demand of the fans. FOBs are remain high. Some quality issues are being reported from the GA region. FL has not quite begun yet but is expected to start soon and bring some relief to the marketplace.

West: While the desert still has some eggs in play for a cheap price, quality is lacking. Turn to Nogales for better quality, yet note that the price point will be a few dollars higher.

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

Garlic
EXTREME - 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
Weather has started to cool down, so the days are shorter and volumes are dropping. Quality is good on the Reds. Prices are poised to rise; growers are preparing to ship from storage. Green seedless sugar levels average 18 Brix; red seedless and portion packs vary from 19 to 20 Brix.

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.

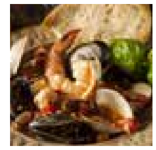
Green Onions
Iced - Prices are average, quality has improved with some heat related damage. Iceless This market is steady and we are seeing heat-related quality issues, but they have improved. We always see this commodity get tighter around Thanksgiving.

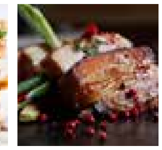
Honeydews
Arizona is also showing almost exclusively smaller sizes 6/8s for honeydew. These should also be finished right around the Thanksgiving holiday.

Jicama
Normal prices and quality is good.

Kale (Green)
Demand is steady and quality has improved. Supplies are steady.

Kiwi
California crops are now in full swing with ample supply available and showing excellent quality. This new crop will extend all the way through to February.





Produce *(continued)*

Lemons
Prices are rising. Stocks will remain tight through November until San Joaquin Valley production ramps up in December; the majority of supplies are being harvested in the Arizona/California desert region.

Lettuce:
Butter
Prices are stable. Quality has improved.

Green and Red Leaf
Quality has improved and prices are stable.

Iceberg Lettuce
Supplies have been up this week. Prices are good. Quality is good.

Romaine
Supply is good. Quality is overall fair, but improving. We are still seeing fringe burn and yellowing on the outer leaves and other heat-related issues. Prices are good.

Romaine Hearts
Supplies are good and prices have improved. Quality has improved. Most issues with quality can be peeled off.

Limes
The market is rising. Industry volume will decline over the next few weeks due to challenging growing conditions. Scarring and discoloration are decreasing yields.

Napa
Supplies are normal. Quality is good.

Idaho/Oregon Onions
Supplies are ample right now on all sizes and varieties. Demand has been steady and we expect fob prices to remain mostly unchanged.

Oranges
The market is steady. The California Navel season is underway, but the overall crop size is below normal. Texas fruit is being supplemented as necessary. Florida juicing oranges are also available.

Parsley (Curly, Italian)
Prices are stable and quality has improved. Steady supply.

Green Bell Pepper
East: A very quick moving and active market is occurring. GA is projecting a freeze in the region and supplies are already limited. Our S. FL crop is not expected to begin until the end of next week, with supplies not expected to increase until after Thanksgiving. Quality can be questionable for the next few week until new crop begins.

West: Although quality is still good, supplies have tightened up as growers move into their second picks. FOBs are back up a few dollars and expected to remain high through Thanksgiving. Quality has dropped to fair to good.

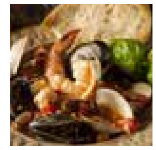
Jalapeño Pepper
East: GA is quickly wrapping up while we wait for FL to begin, which should be in about 7-10 days. Quality is mostly good from what is left form GA.

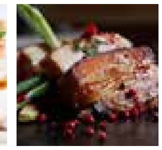
West: FOBs are perking up a bit as chiles transition in the west. New crop is expected to begin later this week which should bring some relief.

Red Bell Pepper
West: Supplies are extremely limited. Most are turning to hot house red pepper to fill the void. Relief is not expected until early December. Prices are up a few dollars into next week. Overall quality is good.

Pineapple
The market is weak; volume is high, especially large fruit. Quality is very good: fruit is juicy and tangy, yet sweet. Sugar levels vary from 13 to 16 Brix.

Idaho Potatoes
This week has been extremely busy at all the sheds in the state. We are in the middle of our largest retail promotion of the year in Thanksgiving. Unlike recent years it appears potato prices in Idaho are holding strong and will continue to do so for the balance of November. There could be some more market activity next week with the abbreviated work week in Idaho and the loss of two days of production due to the holiday.





Produce *(continued)*

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

Salad Blends
Prices are unchanged; growers are making the move south to Yuma. Quality is very good: core material/seeder and internal burn issues are improving. As always, shelf-life is being monitored closely by Inspectors for best quality.

Snow and Sugar Snap Peas
ESCALATED - Snow and sugar snap peas are in high demand and markets are extremely tight.

Spinach (Bunched)
Supply is good and quality has improved.

Spinach (Baby)
Baby and clipped spinach supplies are good. Quality has improved.

Spring Mix
Supplies are good and quality has improved.

Yellow Squash / Zucchini
East: GA has slow supplies coming, but FL is picking up with good quality. Yellow prices are a bit more depressed than green, with green perking up about $1-2.

West: While green remains plentiful and inexpensive, yellow squash is between fields. Therefore FOBs are up a few dollars. Quality still remains good from the Nogales region despite the brief heat wave they previously experienced.

Tomatoes
East

Rounds

Most are passed their crown picks and moving onto second pickings in Palmetto/Ruskin, FL. Supplies will continue to be very slim as the area wraps up from the already light supplies due to Irma. However, demand has been sluggish therefore FOBs remain steady. Quality is excellent. Our Immokalee farms are expected to being in mid-late December, a few weeks behind schedule also due to Irma.

Romas

Eastern production is limited to the Palmetto/Ruskin area. Although this region took a large hit from Irma, roma supplies have been more available than rounds. Combined with sluggish demand, FOBs have fallen ever so slightly. Quality from the area is great. Further relief is not expected until our Immokalee, FL crop begins in mid-December.

Grapes

There is a significant supply gap nationally. The FL region that typically fills this time frame took a major hit from Irma. Prices remain extremely high, yet steady into next week, and relief is not expected for another 3 weeks. Quality, if you can get your hands on them, is very nice.

Cherries

Steady demand and supply is keeping the cherry market steady into next week. Quality is looking great from the FL region. Supply relief is expected in about 3 weeks which should then put downward pressure on the market.

West/Mexico

Rounds

With round production wrapped up in CA and the east being so limited in supply, the west is turning to MX vine ripes to fill the supply gap. This is putting upward pressure on FOB prices as supplies are steadily crossing, but due to increased demand they are still somewhat limited. Quality for vine ripes is good. There could still be a few CA tomatoes lingering in the marketplace. Quality is very poor for what is available.

Romas

MX supplies are steady at this time. Because demand has been so lazy, FOBs remain steady for next week. Quality is looking great.

Grapes

We have reached a very tight market and extreme supply gap as Eastern MX & Baja produce very light supplies. No relief is expected until the first week of December until Nogales can give some supply to the marketplace. Quality is fair as best from the west.

Cherries

Demand and supply remain in equilibrium which is resulting in a steady cherry market. Relief is not expected until after the Thanksgiving holiday. Quality is good at this time.

Watermelons
The market is level; Mexican supplies are expected to remain plentiful for several weeks. Quality ranges from good to very good: fruit is deep red and juicy. Sugar levels range from 10 to 11 Brix.