



# MARKET TRENDS

FOR WEEK ENDING OCTOBER 19, 2018



# MARKET TRENDS

OCTOBER 26, 2018

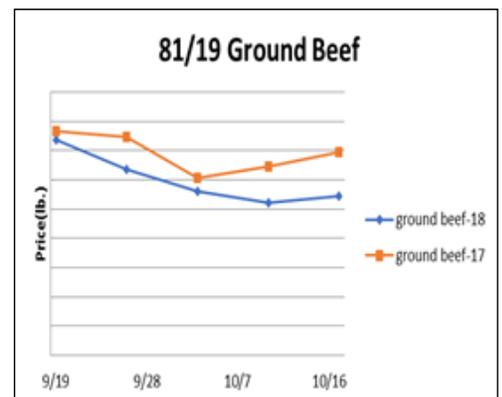
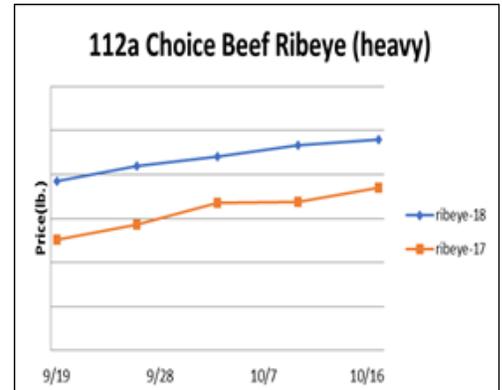
**PERFORMANCE**  
FOODSERVICE



## Beef, Veal & Lamb

Beef output last week fell .4% but was 3.2% better than the same week in 2017. Plentiful near slaughter ready cattle supplies are likely to boost beef production in the coming weeks. But, recent weather challenges in the Midwest may equal lighter cattle weights which could limit projected year-over-year gains in beef output this winter. Beef demand has picked up recently with the four-week total of forward sales 6.9% higher than last year. Wholesale domestic 50% and 90% beef trim prices are below year ago levels which should encourage retail feature activity and support prices. September retail ground beef prices were up 1% from the prior year and were the highest for the month since 2015.

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



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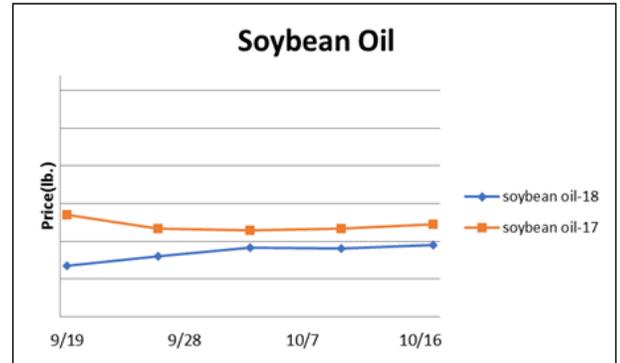
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## Grains

Heavy precipitation and snow in some parts of the Midwest have delayed the corn and soybean harvests as of late. The corn harvest is still on schedule while the soybean harvest is behind. Improving weather should cause the harvest to improve for both in the coming weeks. This could weigh on the markets into early November.

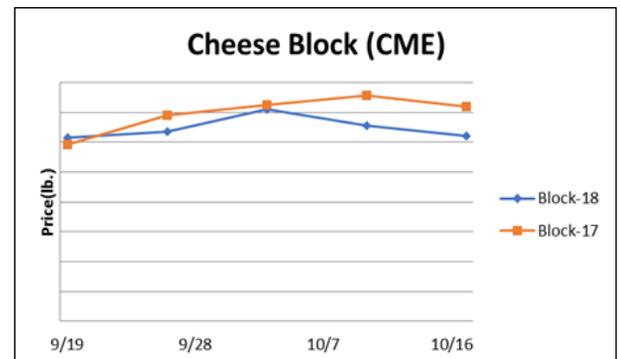
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher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



## Dairy

The large spread between CME cheese blocks and barrels has continued. Demand is starting to shift out of cheese barrels into blocks as consumers temper processed cheese consumption. This could be a longer term trend which may cause a historically large premium in cheese blocks to persist. That said, history signals that the spread also suggests that the upside price risk in cheese blocks from here should only be modest. The butter market remains range-bound. Butter demand has been solid, but stocks are adequate. Modestly lower butter prices are anticipated later this fall.

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



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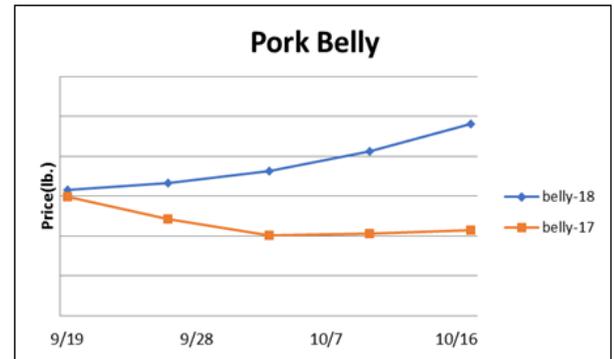
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## Pork

Pork production last week declined .6% and was 1.8% smaller than a year ago. Available hog supplies have been spotty due to the recent hurricanes in the Southeast. Still, larger hog numbers are expected in the coming weeks. The USDA is forecasting Q4 and Q1 ('19) combined pork output to be 4.4% more than a year ago. This should weigh heavy on the pork markets. But, there have been a few new cases of African swine fever reported in China. If this problem persists, it could boost U.S. pork exports which have already been historically strong.

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	Lower
Ham (23-27 lb)	Decreasing	Good	Lower
Loin (bone in)	Decreasing	Good	Higher
Babyback Rib (1.75 lb & up)	Increasing	Good	Higher
Tenderloin (1.25 lb)	Decreasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Decreasing	Good	Higher
Picnic, untrmd	Increasing	Good	Lower
SS Picnic, smoker trm box	Increasing	Good	Lower
42% Trimmings	Decreasing	Good	Higher
72% Trimmings	Increasing	Good	Higher



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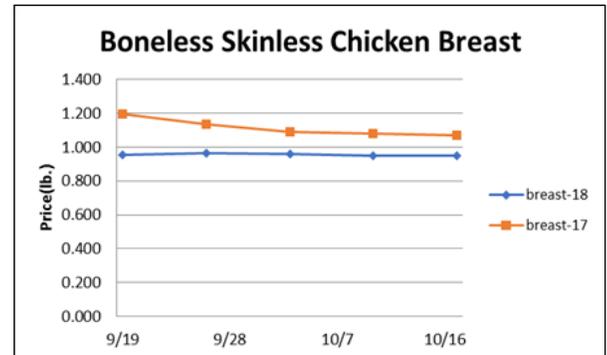
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## Poultry

For the week ending October 6th, chicken production fell .2% but was 3.9% larger than a year ago. Part of the year-over-year increase was due in part to notably heavier chicken weights over the same week in 2017. The six-week total of chicken output stands at 1.3% versus 2017. The USDA is estimating chicken production from this month through March to be up only 1.9% year-over-year. This factor, plus current chicken breast prices being at a notable discount to tender prices, could temper the seasonal downside potential for the chicken breast markets. Since 2013, the average move for the ARA Chicken Tender Index during the next eight weeks was down 10.7%. History suggests that chicken wing prices have already hit their seasonal top.

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



## Eggs

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

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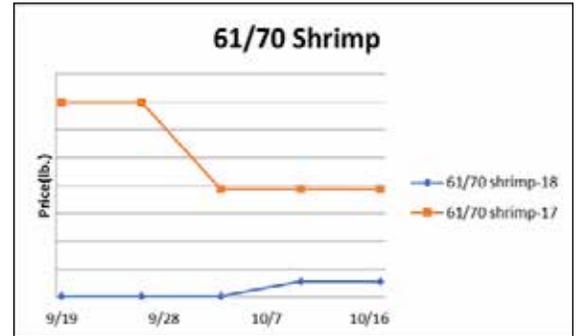
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## Seafood

The salmon markets continue to trade near year ago levels. This is despite strong U.S. imports in August. During the month, the U.S. imported 19.8% more salmon than the previous year. With the U.S. dollar expected to remain relatively inflated into 2019, this should only encourage salmon imports. Thus, the upside price risk in salmon may only be modest.

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



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OCTOBER 26, 2018

**PERFORMANCE**  
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## Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
<b>WOOD PULP (PAPER)</b>			
NBSK- Paper napkin	Decreasing	Good	Higher
42 lb. Linerboard-corrugated box	Increasing	Good	Higher
<b>PLASTIC RESINS (PLASTIC, FOAM)</b>			
PS-CHH-utensils, cups, to-go cont.	Steady	Good	Lower
PP-HIGP-heavy grade utensils	Steady	Good	Higher
PE-LLD-can liners, film, bags	Steady	Good	Lower

## Retail Price Change from Prior Month

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

## Various Markets

The tomato for processing harvest is starting to wind down. At the end of last month, 11.6 million tons had been harvested in California which is the second smallest for the date since 2013. Canned tomato prices could remain fairly inflated this fall.

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



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OCTOBER 26, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce

### Market Overview

Georgia, one of the primary veg growing regions, took a direct hit from Hurricane Michael. We will see major price increases for next week, but still some product available. We anticipate some crop volume to fall short the following two weeks due to high winds dropping blooms. This will affect bell pepper the greatest. Squashes & cucumbers will also feel an affect, but for a shorter time frame due to their faster growth cycles.

Valencias and lemons are still showing higher prices than normal for this time of the year, but they continue to improve weekly.

Due to Hurricane Michael, several commodities will become very short at this time and could potentially remain in EXTREME markets for several weeks. The Salinas Valley growing season will be coming to an end soon.

Over the next few months, please keep in mind that optimal temperatures must be maintained as strictly as possible throughout the supply chain. In the past we have found that late season leafy green vegetables will not hold up as well as the mid-season leafy greens. Please actively take the necessary steps to maximize shelf life, this is very important this time of the year.

### WATCH LIST

- Green Bell Peppers
- Mixed Chili Pepper (Jalapeno, Anaheim, Poblano, Serrano)
- Round and Cherry Tomatoes (East, West, and Mexico)
- Sweet Potatoes and Yams

### Apples & Pears

Prices are unchanged; volume is high. New crop Washington Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are on the market. Packer label Braeburn, Honeycrisp, and Pink Lady apples are also being shipped. Sugar levels in new crop supplies range from 12 to 14 Brix.

Pear prices are steady. New crop Washington Bartlett and D'Anjou Pears are available. California Bartletts will continue shipping through this month, but small sizes will become limited. Sugar levels range from 12 to 14 Brix.

### Artichokes

Quality is excellent, and demand is good.

### Arugula

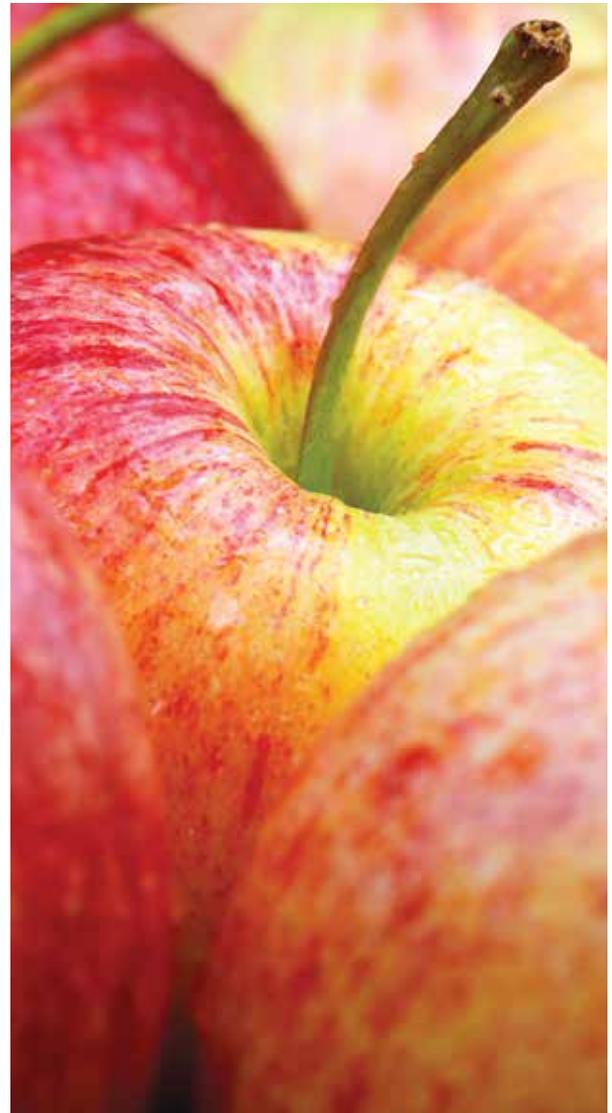
Quality is fair and product is available.

### Asparagus

The market is level. Mexican and Peruvian supplies are available. Quality is best in Mexico: spears are deep green and tips are compact.

### MARKET ALERT

- Cilantro – EXTREME
- Corn – EXTREME
- Green Beans – ACT OF GOD
- Green Onions – ACT OF GOD
- Lemons – EXTREME
- Mushrooms – ESCALATED
- Oranges (Valencias) – EXTREME
- Sugar Snap Peas – EXTREME
- Tomatoes (Romas, Grapes – East, West, and Mexico) – ESCALATED



# MARKET TRENDS

OCTOBER 26, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce *(continued)*

### Avocados

Prices are inching down. The California season has ended. Mexican supplies are abundant, while Peruvian stocks are average. Quality is very good in Mexico, but stocks will be greener, as they are new crop fruit. Peruvian supplies have higher maturity levels/oil content.

### Bananas

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

### Beans

EAST: Supply is still very short, especially with Michael's direct impact on GA's new crop. Both Florence and Michael heavily affected the NC & SC crops as well. FL isn't scheduled to start until early Nov. FOBs will remain high until then. Quality continues to be poor.

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

### Berries:

#### Blackberries

The market is steady; although California volume is decreasing, Mexican stocks are sufficient. Quality is very good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels range from 12 to 13 Brix.

#### Blueberries

Prices are average; volume is adequate in both regions. Pending weather, California supplies will increase in Santa Maria over the next several weeks. Domestic quality is best: berries are deep blue with a slight blush and sweet, yet tangy flavor.

#### Raspberries

Prices are steady. Volume is rising in Oxnard and Santa Maria, California. New crop Mexican supplies are now on the market; supplies are ample. Flavor is sweet: sugar levels are moderately high, ranging from 13 to 14 Brix.

#### Strawberries

Prices are steady, yet high. The Salinas/ Watsonville, California season is winding down. Supplies of new crop fall strawberries are available in Santa Maria. Last weekend's rain didn't disrupt production.

#### Bok Choy

Quality is average, and demand is fair.

### Broccoli

The market is stable. California stocks are sufficient. Mexican supplies are increasing. Domestic quality is very good: browning and yellowing are occasional problems that are being culled at the field level.

### Brussels Sprouts

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

### Cantaloupe

Market strengthening as we are transitioning to the desert for the Fall deal this week. We are still going with light volume out of the Westside and overall quality is fair to good, most of the varieties a ESL Harper they are very strong and have good sugar. We are peaking on 9's and 12's lighter volume on the smaller fruit. This will be the case as we get started in the desert and then in about a week should see some smaller fruit showing up once we get through the first pick. We will be going out of the desert through November.

### Carrots

We are seeing both good quality and volume.

### Cauliflower

Prices are low; stocks are ample. Quality is good: discoloration is an occasional issue.

### Celery

The market is weak. Large sizes (24-count celery) dominate the crop. Quality is very good: dry pith and growth cracking are slight issues.



# MARKET TRENDS

OCTOBER 26, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Cilantro

EXTREME Supplies and quality are fair.

### Corn

EXTREME Supplies will be disrupted out of South Georgia until crop evaluations are made post-Hurricane Michael for all South Georgia production; markets are currently very active and supplies are limited.

### Cucumbers

EAST: Just as GA was ramping up, they took a direct hit from Michael. Fortunately, Cukes have a fairly short growth cycle, so things should rebound over the next couple of weeks. Until then, supply will be tight and FOBs will be high. Look for pricing to increase significantly for next week. Florida is on schedule to start around the first week of November. WEST: Rain hindered production the last week, but volumes are actually still fairly steady overall. Things should improve over the upcoming weeks. FOBs are steady with fair quality available.

### English Cucumbers

Good supplies are now available from Spain and Holland.

### Eggplant

EAST: The Carolinas are seeing some very light supply trickle out of the region and should continue to until first frost. GA's reports aren't 100% in yet, but some fields are still harvesting. FL is looking to start in the next 3-4 weeks. FOBs are steady and quality is fair to good. WEST: Transition out west is in full swing and things are moving along smoothly. FOBs are steady with decent quality available.

### Fennel

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



### Garlic

The market is about 50% done with the 2017 crop. Supplies are steady and prices remain high on domestic product.

### Ginger

Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Costa Rica and Honduras and Peru with no major quality issues being reported.

### Grapes

Market is steady as we are picking throughout the Central Valley which will take us through December. The crop here in the central valley is looking very good as we have a good set and the fruit is fairly consistent in size. We are expecting to have good quality fruit through the year barring any major weather situations, and the estimated volume is about 114 million packed cartons.

### Green Cabbage

Supplies are improving and priced are trending downward.

### Red Cabbage

Supplies are improving and prices are trending downward.

### Green Onions

ACT OF GOD Iced - Demand exceeds supply again this week. Crossings are down over 40% than normal currently and is creating an unprecedented market price. We will continue to see very limited supplies for the next 2-3 weeks. Iceless - Like iced, there are extremely limited supplies crossing from Mexico due to weather. We will continue to see demand exceed supplies for the next 2-3 weeks.

### Honeydew

Market is strengthening with tight supplies of 5's, 6's and better supplies of 8's on the Westside and overall quality is good and sugars are very good as well. We will be going through this week on the Westside, and have started in a light way on desert dews and Mexico is also going. Desert is peaking on Jumbo 5's and 5's with very few of the smaller ones coming at this point. We should start to see some smaller fruit in about 10 days once we get through the first picks.

### JICAMA

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

### Kale (green)

Quality and supplies are good.

# MARKET TRENDS

OCTOBER 26, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Kiwi

Good supplies available on Chilean product.

### Lemons

Market is adjusting as we continue to see Chilean arrive and also seeing a more Mexican fruit crossing, also need to keep in mind that the Mexican volume is about 40-50% lighter than normal. The Chilean will continue to arrive through October and that should be the last of the arrivals for us. We are going on our D3 fruit and are going with some descent volume, fruit is peaking on 140's and 115's at this point, but will see better volumes of smaller fruit as we are size picking at this point. The overall quality of the lemons is good to fair; you will see some heavier scarring and some green tinge on fruit depending where the fruit is coming from. D3 Fruit has been through a lot of heat and is being gassed so you will see some skin breakdown is some of the weaker lots. We expect the market to stay steady, and we anticipate starting Dist. 1 around the first of November.

### Lettuce:

#### Butter

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

#### Green and Red Leaf

Green leaf supplies are light, but demand and quality are good. Red leaf supplies are normal, demand is average, and quality is good.

#### Iceberg Lettuce

Supplies are below budget, and quality is medium.

#### Romaine

Supplies have returned to normal. Demand is good and quality is decent with some minimal fringe burn.

#### Romaine Hearts

Supplies have returned to normal and demand is good. Quality is good.

### Limes

The market is low; supplies are abundant. The Mexican crop is dominated by small sizes. Quality is very good: fruit is juicy and tart.

### Napa

Supplies continue to be below normal this week. Demand is steady and quality is good.

### Onions

The Northwest is about 90% done with harvest, and will finish up this weekend. From here on out, we will be shipping exclusively out of storage. Quality is strong, and sizing and yields are very good. The onions have full skin and will have good shelf life. We are seeing a surplus of Colossal and Super Colossal in better supply, which has resulted in some reduced pricing on these items. Medium onions are on the tighter side due to the profile being heavy to larger onions. White onions have decreased in price as well with better supplies available. Reds remain very plentiful, and we have seen those markets settle out. Overall, the season appears to be leaning toward a more 'normal' year in terms of size, yield and quality. What was once expected to be a very large crop has reduced size in part to the heat wave that the Northwest has been experiencing over the last several weeks.

### Oranges

Market very strong across the board we are seeing several other Valencia shippers finished for the season, Valencia's are peaking on larger sizes so we are seeing much fewer of the small ones demand exceeds supply on 88's, 113's and 138's and this will be the case going forward through the Valencia season. It is also a lighter crop so we will be fighting supplies of fruit through the remainder of the season until we start navels around the third week of October. The overall quality of the Valencia's are just fair with descent color some green tinge which is normal for Valencia's and fruit is not near as firm as a navels and a fair amount of stem end breakdown, juice and sugar content is very good. We will be subbing some Chilean navels when possible to cover the 88's, 113's and 138's on orders just a heads up, if you do not want navels please let us know. Please keep in mind that this fruit is about 19 months old on the tree, and the trees are also carrying next year's crop which puts lots of stress on the tree this is when we see re-greening and softer fruit, stem end aging or skin breakdown. The Valencia's are pretty rough and will only get rougher. The California navel crop estimate for about 20% more volume than last year and we will be peaking on 88's and smaller as we start the season in a couple of weeks.



# MARKET TRENDS

OCTOBER 26, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce *(continued)*

### Parsley(Curly, Italian)

Quality and supplies are good.

### Green Bell Pepper

EAST: After Michael, some growers were able to get into fields and harvest what they could. Due to bloom drop, we could see a shortage occur over the next 4 weeks. FL is on schedule to start in a few weeks, but acreage is down. FOBs are up significantly. Quality reports are good right now, but we expect wind & rain affected fruit to come to light in the upcoming weeks.

WEST:CA is in their seasonal decline, transitioning to the desert area. MX is on schedule to start in about a month. With the east being limited, supply will stay snug until real volume from MX picks up. FOBs are up significantly with quality fair to good from CA.

### Jalapenos (Chiles)

EAST: GA's crop took a direct Michael hit, impacting volumes significantly. Demand would like to move west, but they too were impacted by Sergio. Look for limited supply and high FOBs over the next few weeks.

WEST: With CA on the seasonal decline and Sergio hitting crops direct, things are very shaky for all Chile peppers out west. FOBs are up and supply is very limited. Quality is still good, but we could see an impact from rain in the near future.

### Red Bell Pepper

WEST: Red bells are still feeling some light pressure. FOBs are steady, with some areas up a few dollars. Quality is good to excellent.

### Pineapple

Prices remain elevated due to scarce supplies in Costa Rica and Mexico. Quality is very good: sugar levels range from 13 to 16 Brix.

### Idaho Potatoes

Harvest is concluding, and it is expected that most growers will be coming out of storage next week. There has been Burbank and Norkotah availability and the exact size profile remains uncertain. While the Norkotah crop has been on the larger side, the Burbanks has been on showing smaller sizes. Demand has increased significantly, and pricing has reflected this. Quality has been excellent.

### Pumpkins

Now available out of Indiana and Michigan.

### Radishes

Supplies are steady, and quality is good shipping through Arizona and Florida.

### Salad Blends

Prices are stable. Inspectors are closely monitoring packs for chunks and core material to ensure the highest quality packs.

### Snow and Sugar Snap Peas

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

### Spinach (Bunched)

Quality is fair and product is available.

### Spinach (Baby)

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

### Spring Mix

Prices are unchanged; stocks are sufficient. Quality continues to improve.

### Sweet Potatoes and Yams

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

### Yellow Squash/Zucchini

EAST: GA took a hard hit with many growers affected. Fortunately, squash has a fairly short growth cycle and should rebound quickly. Plant City has just begun in a light way. FOBs are up moderately and quality is fair to good.

WEST: As crops were just looking up, Sergio came through and hindered supply. Fortunately, things should rebound fairly quickly. FOBs are up moderately with only poor to fair quality until new crop rotation.



# MARKET TRENDS

OCTOBER 26, 2018

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### TOMATOES (EAST)

#### Rounds

TN is done for any volume and very light supply is coming from AL. GA also has very light supply. Quincy took a direct hit from Michael and majority of the growers are calling it quits due to devastation. Between GA & AL's volume, there is certainly not enough supply in the east to meet demand. Thus, most demand is moving west and pulling CA crop. We are anxiously awaiting Palmetto/Ruskin to begin in the next 10 days (don't forget though, we have to add transit & ripening time after this!). Sustainable volume is not expected to resume until mid-November. Expect to see prices rise significantly for next week. For what quality we can report on, it is fair to good.

#### Romas

To put things frankly, there are almost no Romas in the east. Romas are about 3 weeks away from Palmetto/Ruskin, and sustainable volume is not expected to return to the east until at least mid-late November. Demand is forced to move west to meet demand. Look for prices to rise significantly.

#### Grapes

Fortunately, Quincy is not a major supplier of grapes in the east. Palmetto/Ruskin has decent numbers coming from fields and will continue to build over the upcoming weeks. FOBs are down and quality is nice.

#### Cherries

Fortunately, Quincy is not a major supplier of cherries in the east. Palmetto/Ruskin has steady numbers. Thus, FOBs are steady with good quality available.

### TOMATOES (WEST)

#### Rounds

We are approaching the downhill slide of the California round season, as some growers are tapping out already due to rainfall. We expect the season to complete October, but if more rain comes this could change. Baja is on the cusp of their fall/early winter crop, but with Sergio coming through late last week, we could see an impact on volumes & quality down the road. FOBs are up, and could continue to rise with the heavy eastern demand. Quality is fair from CA and good from MX. We recommend keeping a very tight inventory as the season comes to a close.

#### Romas

Similar to rounds, CA is on the downhill slide of their production. Baja was close to their ramp up, but has been delayed with Sergio coming through main growing regions late last week. As of today, FOBs are up, but we could see this continue to increase as eastern demand comes on board. Quality is mostly good to excellent.

#### Grapes

Sergio also affected grapes, delaying harvest in most fields in the Baja region. Supply is very light this week. Eastern MX has light supply but not enough to meet demand. FOBs are up significantly. Quality is suspect due to all the rainfall.

#### Cherries

Supply is snug, but steady. Look for FOBs to remain constant for next week. Quality is poor to fair at best.

#### Tree Fruit

Prices are high. The domestic nectarine and peach seasons have ended; black plums will remain on the market through this week. Quality is very good: plum sugar levels range from 12 to 16 Brix.

#### Watermelons

The market is stable. California production is in transition. New crop supplies are increasing in Mexico. Overall quality is very good: sugar levels range from 12 to 13 Brix.

