



# MARKET TRENDS

FOR WEEK ENDING NOVEMBER 16, 2018



# MARKET TRENDS

NOVEMBER 16, 2018

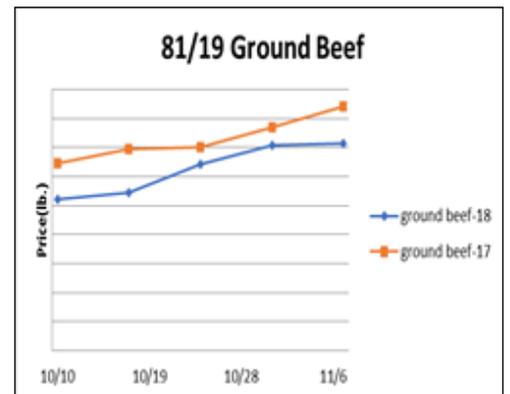
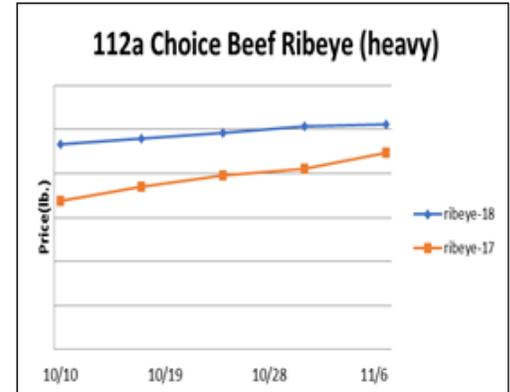
**PERFORMANCE**  
FOODSERVICE



## Beef, Veal & Lamb

Last week cattle slaughter was roughly at 643k head which boosted beef production 1.1% above the prior week but was .7% below a year ago. Lighter carcass weights and seasonally fading fed cattle may temper expected beef output gains this month. USDA beef cutout values appear to be losing upward momentum and are anticipated to seasonally peak soon. Beef demand has been solid, but respectable negotiated forward beef sales may have a tough time keeping pace with year ago levels. Beef packers are expected to be aggressive cattle buyers in the coming weeks which will replenish beef supplies. This will help meet the rising beef demand which always occurs after the Christmas holiday.

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



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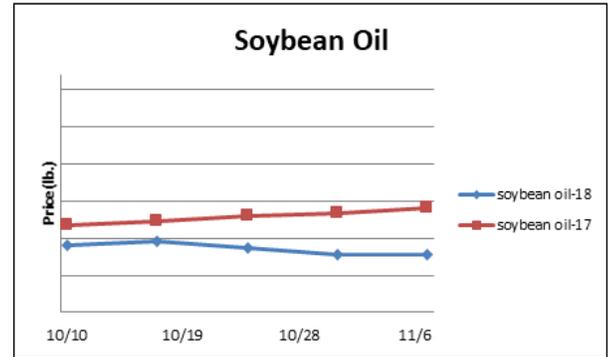
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## Grains

China continues to limit soybean imports from the U.S. During September, the amount of U.S. soybeans exported to China accounted for just over 2% of exports the previous year. This is weighing heavy on the soybean markets. Trade negotiations between the countries will occur later this month. If a deal is reached, it would support prices.

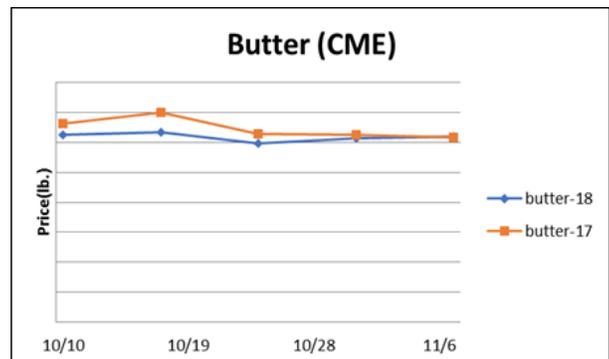
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher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



## Dairy

CME butter prices have firmed modestly due largely to holiday season demand. Butter production during September was down .1% from last year. U.S. butter inventories however are ample for this time of year and may limit the remaining seasonal price gains. Since 2013, the average price move for spot butter during the next five weeks, including this week, was up 8.4%. The CME cheese markets have been choppy recently. Yet, the cheese block price premium over barrels has tightened. Since 2013, the average price move for cheese blocks in the next seven weeks was down 13%.

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



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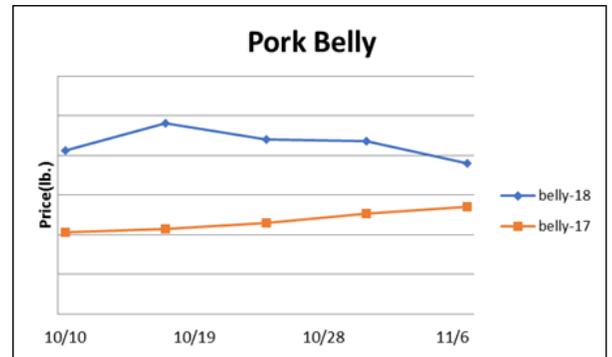
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## Pork

Last week's hog slaughter was estimated to be 6.1% more than last year, but pork production was up only 5.3% versus 2017. Lighter carcass weights tempered those production gains. September pork exports were up 2.6% (yoy) and were the largest for the month since 2012. Despite ongoing tariffs, Mexico remained the top U.S. export partner, accounting for 30% of the total month's export sales. Although export demand remains strong, big year-over-year gains in pork output is expected to influence the various pork markets lower in the coming weeks.

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



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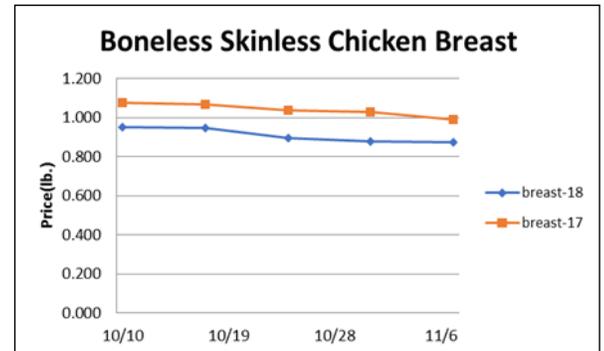
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## Poultry

Chicken production for the week ending October 27th fell 3.3% from the prior week but was .3% larger than the same week last year. The six-week moving average for chicken output ending October 27th stands at 1.2% more than 2017. Historically low chicken breast prices and the cheapest chicken wing prices for this time of year since 2013 are impacting margins. It is possible that the USDA's forecast for Q4 chicken output to be 1.4% more than last year may be overstated. Chicken tender prices are at a record premium over chicken breasts which hints the downside risk for breasts is limited. The chicken wing markets have seasonally peaked but a big decline from here is not expected. U.S. September chicken exports were 11% more than 2017.

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



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

## Eggs

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



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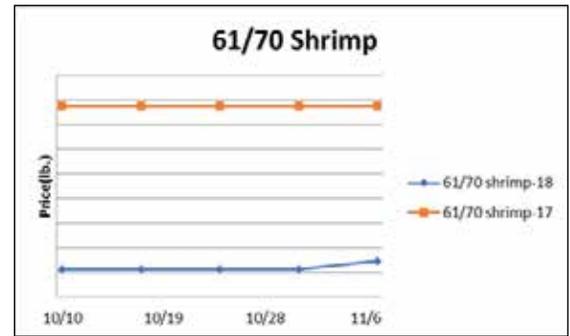
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## Seafood

The salmon markets remain stubbornly above year ago levels due in part to strong demand. During September, U.S. salmon imports were 10.3% more than the previous year. The continued strong dollar should only encourage salmon imports in the coming months. This should temper the upside in the salmon markets as well as various other seafood products.

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



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## Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
<b>WOOD PULP (PAPER)</b>			
NBSK- Paper napkin	Steady	Good	Higher
42 lb. Linerboard-corrugated box	Steady	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 2018 tomato for processing harvest has essentially culminated. The available supply of tomatoes for canning during the next several months is projected to remain below year ago levels. This factor could support the canned tomato markets into the winter.

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



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## Produce

### Market Overview

The Salinas Valley growing season will be coming to an end soon. Please refer to the general end dates for Salinas and start dates for Yuma provided. Brussels sprouts, green bell peppers out of Coachella, yellow squash and zucchinis out of Nogales and GA are all good buys.

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 if temperatures are not properly managed. Please actively take the necessary steps to maximize shelf life as this is very important this time of the year.

### WATCH LIST

- Mixed Chili Pepper (Jalapeno, Anaheim, Poblano, Serrano)
- Round Tomatoes (East, West, and Mexico)
- Snow Peas
- Sweet Potatoes and Yams

### Apples & Pears

The market is unchanged; new crop stocks are ample. Washington Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are available. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 12 to 14 Brix.

The Pear market is level. Washington Bartlett and D'Anjou Pears are available; size is dominated by 110-count and smaller fruit. Sugar levels range from 12 to 14 Brix.

### Artichokes

Quality is excellent, and demand is good.

### Arugula

Quality is fair, with possible mildew due to recent rain followed by warm days. Product is available.

### Asparagus

Prices are stable. Baja supplies are adequate; Peruvian volume is low. Quality is very good in Mexico: spears are deep green and tips are compact.

### Avocados

Currently the market is rising fast. The situation in MX is fluid and there has been no pick at this time for a week +. There are talks with the growers to get them to allow pickers back in to the fields, but as of right now it has not happened. Some fruit that was held up last week at blockades, has been allowed to come to the US. A small faction of growers are behind the stoppage in MX, and they are demanding a minimum pesos amount to allow pickers back in. There is still a lot of fruit on the tree's that needs to be picked. Supplies will be tight until MX gets started picking again.

### MARKET ALERT

- **Avocados – ACT OF GOD/FORCE MAJUERE**
- **Cilantro – EXTREME**
- **Corn – EXTREME**
- **Green Beans – ACT OF GOD**
- **Green Peppers – ESCALATED**
- **Green Onions – EXTREME**
- **Lettuce (Romaine, Iceberg) – ESCALATED**
- **Mushrooms – ESCALATED**
- **Oranges (Valencias) – EXTREME**
- **Sugar Snap Peas – EXTREME**
- **Tomatoes (Romas, Grapes) – ESCALATED**



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## Produce (continued)

### Bananas

Banana volumes are expected to be sufficient with high quality fruit coming into the market. The conditions should continue to be great as no real issues with production are predicted for the remainder of the year.

### Beans

EAST: FI will be in next week which will bring much needed relief to market. Until then, crops are still very tight and quality is poor at best.

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

### Berries:

#### Blackberries

Prices are level. Mexican supplies will increase until they hit their peak in late November/early December. Quality is very good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels range from 12 to 13 Brix.

#### Blueberries

The market is steady to slightly higher than last week. The Oxnard and Santa Maria, California seasons are winding down. Mexican production is increasing. Overall quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

#### Raspberries

The market is inching up; supplies are tightening in Baja, Mexico and Santa Maria, California. Flavor is sweet: sugar levels are moderately high, ranging from 13 to 14 Brix.

#### Strawberries

The market is elevated; stocks are limited but increasing. Santa Maria is the main growing region for new crop fall berries. The Salinas/ Watsonville, California season is ending. Production will also begin in Oxnard in late November/early December. Mexican volume is also rising. Quality is very good, yet bleeding and bruising are occasional issues.

#### Bok Choy

Quality is average, and demand is fair.

#### Broccoli

Prices remain high despite plentiful supplies; hollow core is an industry-wide problem that is reducing shippable volume.

#### Brussels Sprouts

Brussels sprout supplies are plentiful and quality is great.

### Cantaloupe

Market very tight as we have transitioned to the desert for the Fall deal. They did have some rains and hurricanes that did cause quality issues with ground scarring, soft here and some mud on the melons just not very pretty. They are cleaning up and should be in to better. We are peaking on 9's and jumbo 9's and very few about 10% of the pack out is 12's and basically no 15's. The overall quality with all packers is not very good but it is all we have to work with. This fall melon deal will also finish by the end of November if not sooner.

### Carrots

We are seeing both good quality and volume.

### Cauliflower

The market has increased. Stocks are tight; discoloration and uneven size are problems in many regions.

### Celery

Prices are rising; demand is strong as suppliers prepare for seasonal harvesting transitions from the Salinas Valley to Oxnard. Yields will be much lower this season due to a disease called Fusarium.

### Cilantro

EXTREME Supplies are good and quality is fair.

### Corn

EXTREME Corn is still very tight out of the Southeast and is limited in the West (Coachella).



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## Produce (continued)

### Cucumbers

EAST: Good volume is still available from GA, but things are starting to wind down. Production will shift to South FL in the upcoming weeks. FOBs remain weak into next week. Quality from GA is questionable, but new crop FL fruit is very nice. WEST: Despite being in transition, things are shaping up nicely out west. Baja will have some supply going for another 3-4 weeks, but it will be light. Sinaloa has begun with good looking fruit so far. FOBs have balanced back to normal and quality is good.

### English Cucumbers

Good supplies are now available from Spain and Holland eliminating pro-rates as well as showing decreases in the market. We should continue to see improvements; new crop from Mexico is ramping up daily and quality is very nice.

### Eggplant

EAST: There are a few growing areas, but quality is scattered. GA's quality is poor to fair due to Michael while FL's quality is very nice. FOBs are a little stronger this week, but not by much. WEST: There is no shortage of eggplant from the CA desert. We'll see good supply from this area for roughly another 3 weeks before moving onto Mainland MX. FOBs are steady with great 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 prices are trending downward.

### Red Cabbage

Supplies are improving and prices are trending downward.

### Green Onions

EXTREME Iced: Markets are steady, with demand exceeding supply this week. Supplies are still extremely short crossing from Northern Mexico. Additionally, demand due to Eastern local growing deals being finished will keep upward pressure on the market price. Iceless: Similar to iced, the market is steady with demand exceeding supply this week. We will continue to see light supplies this week from Northern Mexico.

### Honeydew

We have transitioned to the desert as well this week and the overall quality is fair at best out of the desert and the melons are also showing the same thing as the Cantaloupes as far as overall quality due to the storms that have come through the California desert and Arizona region. There is heavy scarring and soft fruit here and there. We are peaking on 5's and larger, with very light volume of 6's and basically no 8's showing up. We will hopefully start to see some of the smaller fruit in the coming week.

### 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 fair.

### Kiwi

Good supplies available on Chilean product.



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## Produce (continued)

### Lemons

Market is steady and stronger as we are going out of Dist. 3 and will start here on Dist. 1 first of next week, so the quality of lemons will improve going forward. This year's crop out of dist. 1 will take us into May, and the crop volume is of normal size and should have a decent run of size. The dist. 3 fruit is being gassed and seeing some spotting and green tinge around the stem and blossom end, but fruit is firm and juice content is fair to good. There is still some Chilean around and should be cleaned up in the next 2-3 weeks. The Mexico crop is basically done for the season.

### Lettuce:

#### Butter

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

### Green and Red Leaf

Green leaf supplies are slightly below normal, but demand is good. Quality has been good with some lighter weights. Red leaf supplies are lighter than normal. Demand is average, and quality is good.

### Iceberg Lettuce

ESCALATED Supplies are slightly below normal, but demand is good. Quality has been good with some lighter weights.

### Romaine

ESCALATED Supplies are slightly below normal. Demand is very good and quality is clean, with some minimal fringe burn, cupping, and lighter weights.

### Romaine Hearts

ESCALATED Supplies are lighter than normal and demand is very good. Quality is good with hearts almost fully cupped.

### Limes

Prices have eased; volume is high. Quality is fair: blanching and oil spotting are problems.



### Napa

Supplies are close to normal this week. Demand is steady and quality is good.

### Onions

The Northwest is finished with harvest. 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.

### Oranges

We have finally started our 2018/2019 California navel crop this week and will continue with navels through April, the overall crop volume is up about 20% with this being said we will have good supplies of 88's-138's through the season. The larger size fruit will be on the tighter side, for the first few months until we get some rain (Hopefully) and that will help size up the fruit. The overall sugar starting out has been around 12 brix, so fruit does eat ok and will only get better in the coming weeks as our daytime temperatures have been above normal helping with the sugar content. Also, the navels are being gassed about 72-120- hours to bring on the color, you will see some green tinge and some spotting due to the gassing here and there but nothing overwhelming. We anticipate a good quality year on navels going forward and will keep you posted if we see any issues coming down the pipeline.

### Parsley(Curly, Italian)

Quality and supplies are good.

### Green Bell Pepper

EAST: We continue to feel the aftermath of Michael's devastation to GA. Their yield and quality are both drastically down. Plant City has a few peppers but not enough to meet demand needs. Bells will be tight through November and into the early part of December when South FL gets started. WEST: Supply is very scattered in the west. A lot of shippers have small volume. Look for things to improve once Nogales gets started in the next few weeks. FOBs are expected to remain high throughout the transition. Quality is mostly good but can vary. Older fields are showing more signs of weakness.

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## Produce (continued)

### Jalapenos (Chiles)

EAST: There are still very light supplies from GA, but fortunately Plant City will begin in the 7 days. This will provide some relief for eastern demand. Quality is scattered with mixed reports of fair to good.

WEST: Between transition, Sergio & Willa, things are not looking great for chiles in the short term. Santa Maria & Baja are currently having quality struggles. Newer areas are slow to come on board due to the recent Hurricanes. Some of the new regions suffered extreme damage, while other areas was more moderate. FOBs are up significantly while quality is poor to fair. It is unclear how long it will take for this to work itself out at this time.

### Red and Yellow Bell Pepper

The market is elevated; supplies are extremely limited. California desert stocks are tight, while production in Western Mexico is one to two weeks away from starting. Quality ranges from fair to good: scarring is an industry-wide problem.

### Pineapple

Prices have inched up due to rain in Mexico; demand has shifted to Costa Rica. Expect tight supplies for several weeks. Quality is good: sugar levels range from 13 to 16 Brix.

### Idaho Potatoes

Harvest has concluded, and all growers are coming out of storage. There has been Burbank and Norkotah availability, and the Norkotah profile remains on the larger side. While the Norkotah crop has been on the larger side, the Burbanks have been showing smaller sizes. Demand has increased significantly with the holidays approaching, and pricing has reflected this. Quality has been excellent.

### Radishes

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

### Salad Blends

The market is holding steady, despite challenging quality. Internal burn and mildew have been reported in raw product stocks throughout the industry. Inspectors are closely monitoring supplies so that products achieve the highest quality packs.

### Snow and Sugar Snap Peas

EXTREME Sugar snap peas will be EXTREMELY tight for the next 3+ weeks, this is going to affect the volumes available for Thanksgiving. Pricing will be higher and will be prorated by 50%.

### Snow Peas

WATCH LIST Snows peas are coming in steadily, but there is not a lot of volume is available. Our teams are keeping an eye on this as pricing rises.

### Spinach (Bunched)

Quality is fair with possible mildew. Product is readily available.

### Spinach (Baby)

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

### Spring Mix

The market is level; supplies are adequate. Quality is average: growers are preparing for the fall transition south to Yuma, Arizona.

### Yellow Squash/Zucchini

Surprisingly, most growers have rebounded rather quickly from Hurricane Michael. FOBs are down with relatively good quality available considering the amount of wind the area is receiving. Plant City has light supply, but FL will really ramp up in about 14 days. Supply is readily available out of the West as well. Santa Maria is done while Nogales continues to produce good volume with good quality. FOBs are down.



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## Produce (continued)

### TOMATOES (EAST)

#### Rounds

Palmetto/Ruskin is the main player right now. They are moving along nicely, however, the crop is only a mere average right now. Volume from the east is not expected to ramp up until around late November as things head south. Temperatures have been abnormally warm which has stunted the growth cycle, resulting in larger volume of medium size and less extra-large & large sizes. Additionally, with the west wrapping up, demand has strengthened for eastern tomatoes for now, pricing is fairly steady to just slightly up. Quality has been good to excellent for the most part, however, occasionally there is a field rotation showing weaker quality. Quality is expected to improve as we move into new fields.

#### Romas

There are only a handful of Roma's in the east and most of the volume is staying close to home. Palmetto is still 10-14 days from any decent numbers. FOBs are still high, but steady week over week. Quality is mostly good for what is available, but there are the occasional fields with weaker quality. This is expected to improve in the upcoming weeks as volume improves.

Grapes- Volume has slightly dipped, tightening up supply just slightly. Again, things in Palmetto are just average right now, but improvement is expected in the next 10-14 days. Quality is mostly good, however, we are seeing some minor imperfections on most lots at this time.

Cherries- Cherry supply has been steady as she goes. No change in demand, supply, or FOBs. Good quality is available.

#### Grapes

- Volume has slightly dipped, tightening up supply just slightly. Again, things in Palmetto are just average right now, but improvement is expected in the next 10-14 days. Quality is mostly good, however, we are seeing some minor imperfections on most lots at this time.

#### Cherries

Cherry supply has been steady as she goes. No change in demand, supply, or FOBs. Good quality is available.

### TOMATOES (WEST)

#### Rounds

All major players are done at this time. If you are purchasing anything left in CA, it is a "buy if your dare" situation. Demand has moved to either the limited volume from MX & east coast. Baja has slightly begun, but not enough volume to meet demand. Eastern MX will have sporadic supplies the next month and Mainland MX will begin with mature greens in early December. Because of the shortage in the west, for pricing sake, most are sourcing & pricing using eastern quotes. Therefore, quotes are up significantly. Quality out east is mostly good and expected to improve further.

#### Romas

CA is done for sake of finding decent quality. MX is slowly picking up volume, but demand is still very strong from the east. Thus, keeping pricing higher and even pushing it up. Quality from MX has been good to excellent.

#### Grapes

Relief has been taken as fast as it was given. Cooler temperatures, rain saturated fields, poor production numbers from Baja, and strong demand from both coasts push FOBs upward significantly. Quality is poor to fair at best. We recommend keeping a very tight inventory.

#### Cherries

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

#### Watermelons

The market is slightly lower than last week; stocks are abundant. Mexico is the primary growing region for the winter. Overall quality is average: sugar levels range from 12 to 13 Brix. Offshore melons will hit the market in late November.

