



MARKET TRENDS

FOR WEEK ENDING NOVEMBER 2, 2018



MARKET TRENDS

NOVEMBER 2, 2018

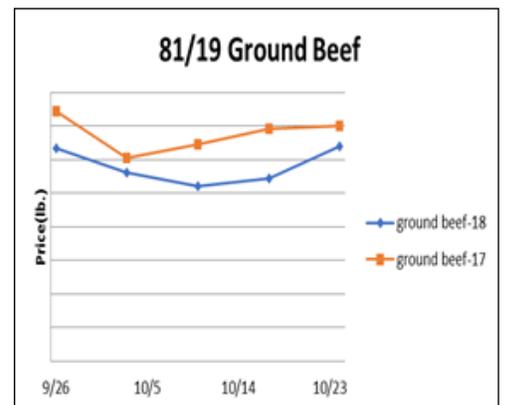
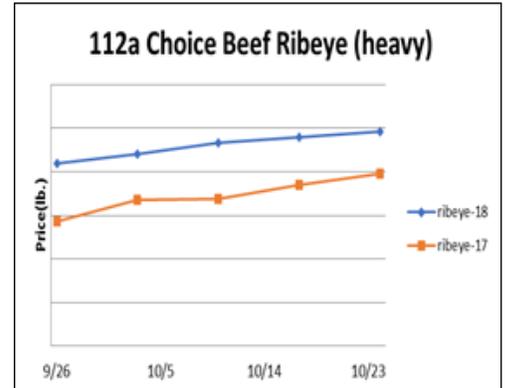
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Last week beef production declined 2% from the previous week and was .7% below a year ago. Despite modestly heavier carcasses from a year ago, output was hampered by smaller than expected slaughter. Given larger feedlot placements this past summer, total on-feed cattle are record large, and front-end supplies are projected to remain ample. The USDA is calling Q4 beef production to be up 2.9% (yoy). Beef demand remains brisk, with the four-week average of forward sales 3.3% better than last year. Choice ribeye and tenderloin prices are running well above a year ago but are expected to seasonally peak in the late fall. The boneless beef trim markets continue to languish near two-year lows.

| Description | Market Trend | Supplies | Price vs. Last Year |
|------------------------------|--------------|----------|---------------------|
| Live Cattle (Steer) | Decreasing | Short | Lower |
| Feeder Cattle Index (CME) | Decreasing | Short | Higher |
| Ground Beef 81/19 | Increasing | Good | Lower |
| Ground Chuck | Increasing | Good | Lower |
| 109 Export Rib (ch) | Increasing | Good | Higher |
| 109 Export Rib (pr) | Decreasing | 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) | Increasing | Good | Lower |
| 116 Chuck (ch) | Increasing | Good | Higher |
| 116b Chuck Tender (ch) | Increasing | Good | Lower |
| 120 Brisket (ch) | Increasing | Good | Higher |
| 120a Brisket (ch) | Decreasing | Good | Lower |
| 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) | Increasing | Good | Higher |
| 168 Inside Round (ch) | Increasing | Good | Higher |
| 169 Top Round (ch) | Increasing | Good | Higher |
| 171b Outside Round (ch) | Increasing | Good | Higher |
| 174 Short Loin (ch 0x1) | Increasing | Good | Higher |
| 174 Short Loin (pr 2x3) | Increasing | Good | Lower |
| 180 0x1 Strip (ch) | Decreasing | Good | Lower |
| 180 0x1 Strip (pr) | Decreasing | Good | Lower |
| 184 Top Butt, boneless (ch) | Decreasing | Good | Higher |
| 184 Top Butt, boneless (pr) | Increasing | Good | Lower |
| 184-3 Top Butt, bnls (ch) | Increasing | Good | Higher |
| 185a Sirloin Flap (ch) | Increasing | Good | Higher |
| 185c Loin, Tri-Tip (ch) | Increasing | Good | Higher |
| 189a Tender (sel, 5 lb & up) | Increasing | Good | Higher |
| 189a Tender (ch, 5 lb & up) | Increasing | Good | Higher |
| 189a Tender (pr, heavy) | Increasing | Good | Lower |
| 193 Flank Steak (ch) | Decreasing | Good | Higher |
| 50% Trimmings | Increasing | Good | Lower |
| 65% Trimmings | Increasing | 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) | Steady | Good | Higher |
| Veal Top Round (cap off) | Steady | Good | Higher |



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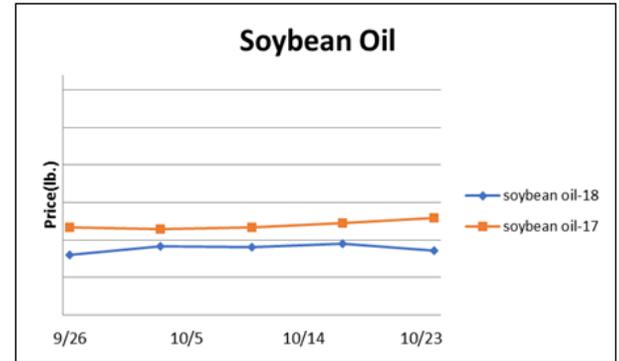
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Grains

The domestic winter wheat planting season is progressing. As of October 21st, 72% of the crop was in the ground. This compares to the five-year average for the date of 77%. Soil moisture conditions are improving for winter wheat, and no drought is anticipated into the early winter.

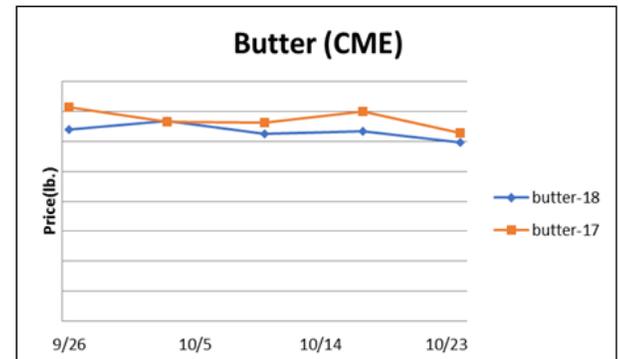
| Description | Market Trend | Supplies | Price vs. Last Year |
|--------------------------|--------------|----------|---------------------|
| Soybeans, bushel | Decreasing | Good | Lower |
| Crude Soybean Oil, lb | Decreasing | Good | Lower |
| Soybean Meal, ton | Decreasing | Good | Higher |
| Corn,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



Dairy

Domestic milk production growth may be showing some early signs of slowing. During September, milk output in the U.S. rose 1.3% from the previous year despite a .3% reduction of the milk cow herd (yoy). The milk-per-cow yield was 1.6% better than a year ago. But, the milk cow herd during the month declined by 12,000 head. Plus, the USDA revised lower its July and August herd estimates. This data suggests that forecasted year-over-year milk output gains may be tempered which could limit the seasonal price weakness for cheese and butter which occurs during the late 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) | Decreasing | Good | Lower |
| Nonfat Dry Milk | Increasing | Ample | Higher |
| Whey, Dry | Increasing | Good | Higher |
| Class 1 Base | Decreasing | Good | Lower |
| Class II Cream, heavy | Increasing | Good | Higher |
| Class III Milk (CME) | Decreasing | Good | Lower |
| Class IV Milk (CME) | Increasing | Good | Higher |



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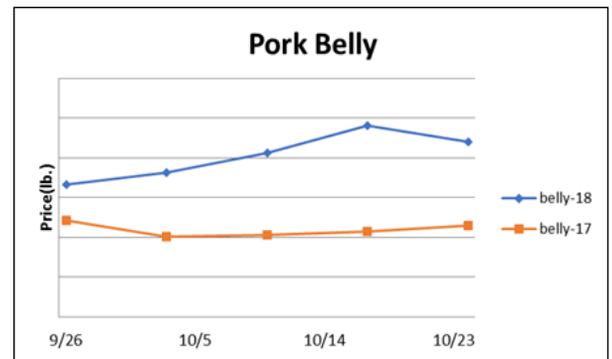
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Pork

Pork production last week jumped 4.2% from the prior week and was up 3.9% from last year. It was the largest weekly hog harvest ever recorded. Despite 2.6 million hogs being slaughtered, lighter year-over-year carcass weights tempered the already historically strong output. In the coming weeks, plentiful hogs, at heavier weights are expected to boost year-over-year pork production gains. Seasonal holiday ham interests have been modest. Since 2015, the average move for the 23-27 lb. ham market in the first two weeks of November is up 3.6%.

| 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) | Increasing | Good | Lower |
| Ham (20-23 lb) | Decreasing | Good | Lower |
| Ham (23-27 lb) | Increasing | Good | Lower |
| Loin (bone in) | Decreasing | Good | Higher |
| Babyback Rib (1.75 lb & up) | Increasing | Good | Higher |
| Tenderloin (1.25 lb) | Increasing | Good | Lower |
| Boston Butt, untrmd (4-8 lb) | Decreasing | Good | Higher |
| Picnic, untrmd | Decreasing | Good | Lower |
| SS Picnic, smoker trm box | Increasing | Good | Lower |
| 42% Trimmings | Decreasing | Good | Higher |
| 72% Trimmings | Decreasing | Good | Lower |



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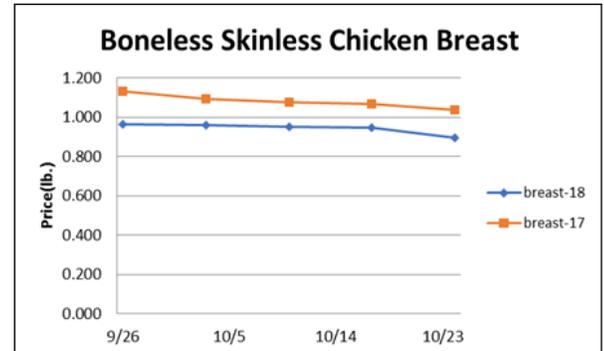
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Poultry

For the week ending October 13th, chicken output declined 3.8% and was 1.5% less than a year ago. The smaller year-over-year decrease was due mostly to Hurricane Michael's impact on Georgia's chicken production, the country's number one broiler provider. The six-week total of chicken output stands at up only .1% versus 2017. Last week spot margins for producers were the lowest for the week since 2012. If waning profitability persists with a declining number of broiler layers occurring, it's likely that the chicken markets could experience counter seasonal support. The ARA boneless skinless Chicken Breast Index is the cheapest since at least 2007. This should eventually equal lower retail chicken breast prices and help boost demand.

| Description | Market Trend | Supplies | Price vs. Last Year |
|-----------------------------|--------------|----------|---------------------|
| Whole Birds WOG-Nat | Increasing | 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 | Decreasing | Good | Lower |
| Breast Boneless Index (ARA) | Decreasing | Good | Lower |
| Tenderloin Index (ARA) | Increasing | Good | Higher |
| Legs (whole) | Decreasing | Good | Lower |
| Leg Quarter Index (ARA) | Decreasing | Good | Lower |
| Thighs, Bone In | Decreasing | 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 | Higher |
| Medium Eggs (dozen) | Decreasing | Short | Lower |
| Liquid Whole Eggs | Steady | Short | Lower |
| Liquid Egg Whites | Steady | Short | Higher |
| Liquid Egg Yolks | Steady | Short | Lower |
| Egg Breaker Stock Central | Steady | Short | Lower |



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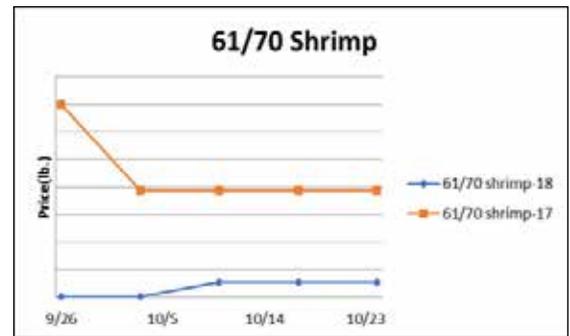
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Seafood

The snow crab leg markets remain elevated. During August, the U.S. imported 17.1% less snow crab than the previous year due to the tight world supplies. The 2018-19 Alaska Bering Sea snow crab quota is 50% bigger than last year which should aid supplies some by the spring. But the higher quota won't likely be near enough to normalize prices or supplies.

| 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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Paper and Plastic Products

| Description | Market Trend | Supplies | Price vs. Last Year |
|---------------------------------------|--------------|----------|---------------------|
| WOOD PULP (PAPER) | | | |
| NBSK- Paper napkin | Steady | Good | Higher |
| 42 lb. Linerboard-corrugated box | Steady | Good | Higher |
| PLASTIC RESINS (PLASTIC, FOAM) | | | |
| PS-CHH-utensils, cups, to-go cont. | Steady | Good | Lower |
| PP-HIGP-heavy grade utensils | Steady | Good | 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 coffee markets have strengthened in recent weeks. World supplies are still estimated to be at least adequate but the currency value in Brazil has firmed due to the perceived favorable Presidential election result. Coffee prices could be especially volatile over the next few weeks.

| 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 | Decreasing | Short | Higher |
| Orange Juice lb ICE | Decreasing | Good | Lower |
| Honey (clover) lb | Steady | Good | Higher |



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Produce

Market Overview

Due to the aftermath of 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 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 and Cherry Tomatoes (East, West, and Mexico)
- Sweet Potatoes and Yams

Georgia, one of the primary veg growing regions, took a direct hit from Hurricane Michael. As suspected, we are now feeling the effects of the storm. We are keeping a close eye on Hurricane Willa as she approaches landfall and heads towards mainland MX.

Apples & Pears

The market is stable; new crop stocks are ample. Washington Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are available. Sugar levels range from 12 to 14 Brix.

The Pear market is steady. New crop Washington Bartlett and D'Anjou Pears are available. The California Bartlett season will end next week and restart in June 2019. 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

Prices are steady. Mexican volume is average; growers are now harvesting the Baja region. Quality is best in Mexico: spears are deep green and tips are compact.

Avocados

The market has eased. Mexican stocks are plentiful. Peruvian supplies are adequate. Quality is very good in Mexico, but fruit is greener because the crop is young. Peruvian stocks have higher oil content, giving them creamy texture.

Bananas

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

MARKET ALERT

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



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Produce (continued)

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 is still about 2 weeks out. 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

Prices are unchanged. The California season is winding down. Mexican supplies are average. 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 level; stocks are sufficient in both areas. California volume is rising in Santa Maria. Domestic quality is very good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

The market is unchanged. Supplies are plentiful in Oxnard and Santa Maria, California. New crop Mexican stocks are also on the market. Flavor is sweet: sugar levels are moderately high, ranging from 13 to 14 Brix.

Strawberries

The market is up; warm weather is causing bleeding, bruising, small size, and softness. Santa Maria is the main growing region for new crop fall berries. The Salinas/Watsonville, California season is nearly over; volume is low.

Bok Choy

Quality is average, and demand is fair.

Broccoli

Prices are high; supplies are limited. Quality is average: hollow core is an issue being caused by adverse weather.

Brussels Sprouts

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

Cantaloupe

Market strengthening as we have transitioned to the desert for the Fall deal this week. They did have some rains that did cause a few quality issues with scarring, soft here and some mud on the melons. They are cleaning up and should be in to better volume and quality by the weekend. We are peaking on 9's and jumbo 9's and very few about 10% of the pack out 12's and 15's coming in. We should also start to see some smaller fruit by the end of next week

Carrots

We are seeing both good quality and volume.

Cauliflower

The market is weak; supplies are abundant. Quality is average: discoloration is a minor problem.

Celery

Prices have escalated; small sizes are especially limited. Quality is average: dry pith and growth cracking are issues..

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: GA is still suffering from Michael, but fortunately there is light volume coming from Plant City that is able to help the east. South FL will start in about two weeks with low volume and slowly build. FOBs are steady into next week. Quality has been mostly good, but there are scattered impacts due to rains.

WEST: Though still seeing some light volumes, Baja is finally starting to build some decent numbers after all the recent rainfall. Because of this, FOBs are falling slightly. Quality has been mostly good, but there are some scattered impacts due to rains.



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Produce *(continued)*

English Cucumbers

Good supplies are now available from Spain and Holland. We should continue to see improvements; new crop from Mexico is ramping up daily and quality is very nice.

Eggplant

EAST: The Carolinas are seeing some very light supply trickle out of the region and should continue to until first frost. Georgia has decent supply considering Michael. FL is looking to start in the next 2-3 weeks. Weather permitting, it should be a smooth transition. FOBs are steady and quality is good. WEST: There is no shortage of eggplant out west as the transition starts to wrap up. FOBs are steady with great quality available.

Fennel

EXTREME Supplies and quality are fair.

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

EXTREME Iced - Demand exceeds supply again this week, but we should be better by the end of the week. The market price is still very high. We will slowly see better 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

We are also transitioning to the desert as well this week and the overall quality is fair to good 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 cone through the California desert and Arizona region. We are peaking on 5's and larger, with very light volume of 6's and 8's showing up. We will hopefully start to see some of the smaller fruit by the end of next week and much cleaner fruit.

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

Lemons

We are going out of Dist. 3 in a light way and will start here on Dist. 1 fruit end 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 if 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.



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Produce *(continued)*

Lettuce:

Butter

Supplies are light, 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

Prices are weak; supplies are plentiful. Quality is good: blanching and scarring 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. 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

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 120- hours to bring on the color, you will see some green tinge and some spotting 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: Most of the mature pepper was lost in Michael, however, surprisingly a lot of the young plants survived. Unfortunately, with the bloom drop, we are feeling that tight market pressure already. Supply is short and prices remain high and firm, yet fairly steady. Quality is mostly good. South FL will start in about 2 weeks, which will be the first opportunity at relief.

WEST: CA is still transitioning from the valley to the desert area. MX is still on schedule, but about 3 weeks out. Because of this, supply will remain snug with light supply available until the end of November. FOBs are up again and quality is fair to mostly good.



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Produce (continued)

Jalapenos (Chiles)

EAST: Due to Michael, chile production is down significantly in the GA area. Light supply is keeping FOBs high yet steady. For what is available quality is good to excellent.

WEST: Chiles in the west are in a transition period. Additionally, the older growing regions have been hit by multiple storms and the new blocks are in line to take a hit from Hurricane Willa. This storm could potentially have a devastating effect on chiles. FOBs are pushing upward and quality is mostly good, with some light conditional defects appears from prior rain & heat.

Red and Yellow Bell Pepper

The market is elevated; supplies are scarce, which is normal for this time of year. The California desert season and harvesting in Western Mexico are approximately one month away. Quality is good: scarring is a slight problem.

Pineapple

Prices have stabilized; volume is sufficient. 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

The market is steady. Inspectors are closely monitoring packs for chunks and core material, internal burn, and mildew. Suppliers are using the best available lots for Peak products to achieve 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

The market is level; supplies are adequate. Quality is very good: growers are preparing for next month's move south to Yuma, Arizona.

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: Surprisingly, most growers have rebounded rather quickly from Michael. FOBs are down slightly with relatively good quality available considering the amount of wind the area receiving. Plant City has light supply, but FL will really ramp up in about 14 days.

WEST: Supply is readily available out west as well. Santa Maria is trying to squeeze what they can out of their fields while Nogales continues to product good volume with good quality. FOBs are down slightly.



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Produce (continued)

TOMATOES (EAST)

Rounds

For the few growers that attempted to salvage what they could from their Quincy crops, they are now officially done. Georgia took some light damage from Michael, but growers there have been more successful finding decent quality to pick. However, supply is very limited from the area. Finally, we are seeing Palmetto/Ruskin getting started in very light way, but by no means do they have any volume. Things are just ramping up there and will take a few weeks to start to fill the pipe line (don't forget about ripening & transit time!). Look for relief around the 2nd week of November, possible into the 3rd pending weather conditions. FOBs still remain high but seem to have stabilized for now with Ruskin coming on board. Quality from Georgia is fair to good while Florida's first picks have been excellent.

Romas

Still, little to no eastern romas available. Demand has shifted west. Palmetto/Ruskin's first harvests are on tap to begin in about 2 weeks. Until then, things will continue to be very snug. Please reference western roma update for quality & FOB information.

Grapes

Palmetto/Ruskin has been going for a few weeks now, with decent supply available. Things are still a bit on the light side, with not enough volume out there to drive FOBs down. Look for pricing to be steady into next week. Quality has been good to excellent.

Cherries

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

TOMATOES (WEST)

Rounds

Majority of growers have begun their end of season decline. Four major players are wrapping up by the end of this week, and three more are expected to be done by the end of next. With this, volume is dropping rather quickly, however, we still expect to have a decent supply available through October and into the beginning of November. Eastern MX production will be sporadic as growers work through the fields affected heavily by the rainfall received the last 3 weeks. FOBs are slightly down with demand weakening. Quality is fair at best. We recommend keeping a very tight inventory as the season comes to a close.

Romas

The CA season is on the downward slide, just like rounds. Growers are starting to drop off with limited availability across the state. Additionally, Baja also has very light production, however is expected to start increasing volume in the next 10-14 days. FOBs are feeling more upward pressure, especially with the increased eastern demand. Quality is mostly good, but some rain affected defects are starting to appear.

Grapes

Finally, there is relief. Still limited, but much improved week over week. Mainland MX crops are starting in a light way, bringing more supply to market. FOBs still are a bit high but have dropped to a manageable price range. Quality is fair but improving.

Cherries

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

Watermelons

The market is slightly higher than last week. The California season is wrapping up. Mexican growers are in transition between harvesting regions. Overall quality is very good: sugar levels range from 12 to 13 Brix.

