



MARKET TRENDS

FOR WEEK ENDING NOVEMBER 9, 2018



MARKET TRENDS

NOVEMBER 9, 2018

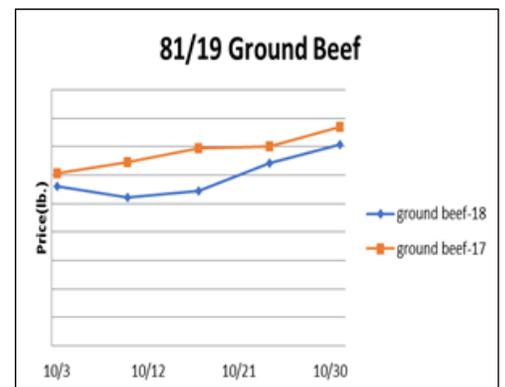
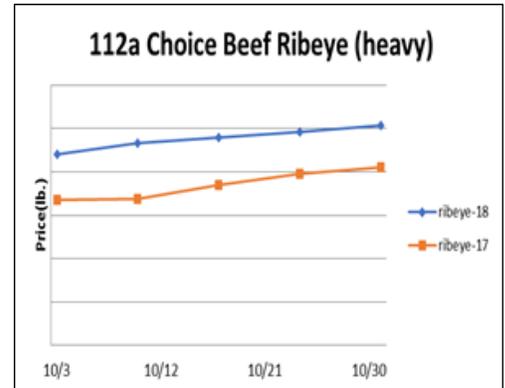
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Last week's cattle slaughter came in at an estimated 633k head, only slightly larger than last year. But, heavier carcass weights boosted total beef output 1.3% from 2017. Larger kills are expected to increase beef production in the coming weeks as packers move aggressively to fill robust export commitments and solid forward sales obligations. This should support beef prices in the near term. Stronger cattle placements earlier this year, but at lighter weights, continue to portend available market-ready cattle into late Q1. However, seasonal beef demand, especially for ground beef, this winter is likely to absorb the large beef supplies at lower prices than what were in place a year ago

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	Increasing	Good	Lower
109 Export Rib (ch)	Increasing	Good	Higher
109 Export Rib (pr)	Increasing	Good	Higher
112a Ribeye (ch)	Increasing	Good	Higher
112a Ribeye (pr)	Increasing	Good	Higher
114a Chuck , Shlder Cld(ch)	Increasing	Good	Higher
116 Chuck (sel)	Increasing	Good	Higher
116 Chuck (ch)	Increasing	Good	Lower
116b Chuck Tender (ch)	Increasing	Good	Lower
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Increasing	Good	Higher
121c Outside Skirt (ch/sel)	Increasing	Good	Higher
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Increasing	Good	Higher
167a Knuckle, Trimmed (ch)	Increasing	Good	Higher
168 Inside Round (ch)	Increasing	Good	Higher
169 Top Round (ch)	Decreasing	Good	Lower
171b Outside Round (ch)	Increasing	Good	Higher
174 Short Loin (ch 0x1)	Increasing	Good	Lower
174 Short Loin (pr 2x3)	Increasing	Good	Higher
180 0x1 Strip (ch)	Decreasing	Good	Lower
180 0x1 Strip (pr)	Increasing	Good	Lower
184 Top Butt, boneless (ch)	Increasing	Good	Higher
184 Top Butt, boneless (pr)	Increasing	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Higher
185a Sirloin Flap (ch)	Increasing	Good	Higher
185c Loin, Tri-Tip (ch)	Increasing	Good	Higher
189a Tender (sel, 5 lb & up)	Increasing	Good	Higher
189a Tender (ch, 5 lb & up)	Decreasing	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	Decreasing	Short	Lower
90% Trimmings	Decreasing	Short	Lower
90% Imported Beef (frz)	Steady	Good	Lower
95% Imported Beef (frz)	Increasing	Good	Lower
Veal Rack (Hotel 7 rib)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Higher



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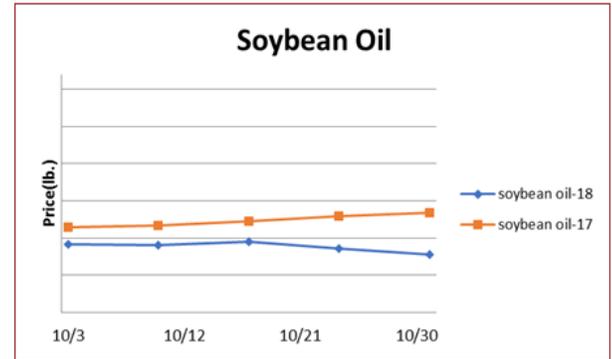
PERFORMANCE
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Grains

Soil moisture conditions for the domestic winter wheat crop have improved considerably this fall. As of October 28th, 53% of the 2019-20 U.S. winter wheat crop was rated in either good or excellent condition. This compares to 52% last year. Forecasts for favorable weather could weigh heavy on wheat futures in the near term.

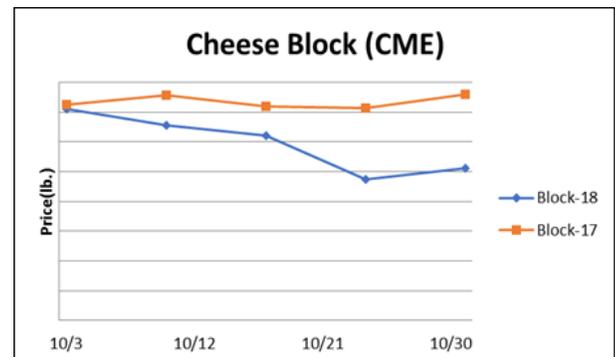
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Steady	Good	Higher
Distillers Grain, Dry	Decreasing	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	Increasing	Good	Same
Black Beans, lb	Decreasing	Good	Higher
Rice, Long Grain, lb	Steady	Good	Higher



Dairy

CME cheese prices have been range-bound but increased demand for the holiday season usually supports prices in the near term. September 30th cheese stocks were 4.5% larger than last year and a record for the month. Cheese holdings grew for the month for the first time since 2012. Since 2013, the average price move for cheese blocks from early November through the end of the year was down 13%. The butter markets have been steady. September 30th butter stocks were 10.7% more than last year and the biggest for the date since 1993. Butter prices usually rise over the next six weeks.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Lower
Cheese Blocks (CME)	Increasing	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	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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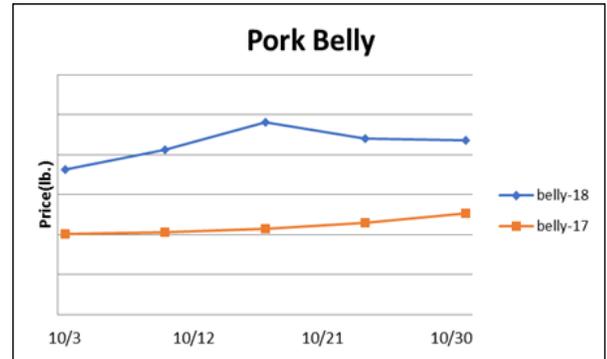
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Pork

Pork production fell 0.7% last week but was 4% larger than the same week in 2017. It was the second biggest slaughter week this year. Additional record-setting hog slaughter is anticipated in the coming weeks and supports the USDA's Q4 forecast for production to run 4.9% over a year ago. This should put downward pressure on the pork markets moving forward. The USDA pork belly cutout is currently up 41% vs. last year, but the downside risk remains elevated heading into the end of the year. African swine fever in China is still a concern.

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)	Decreasing	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	Higher
Picnic, untrmd	Increasing	Good	Lower
SS Picnic, smoker trm box	Increasing	Good	Lower
42% Trimmings	Decreasing	Good	Lower
72% Trimmings	Decreasing	Good	Lower



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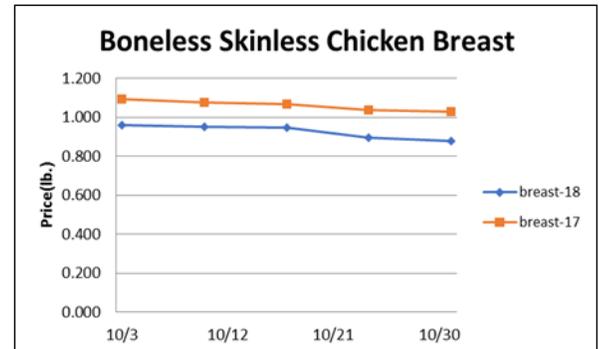
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Poultry

For the week ending October 20th, chicken production increased 3.4% from the prior week and was 4.3% larger than a year ago. But, the six-week total for chicken output stands at just .8% better than 2017. Weakening margins could temper chicken production in the near term. Yet, the USDA is projecting Q4 2018 output to be 1.9% more than last year. Still, erratic pullet placements into the hatchery flock hints that annual chicken output expansion could be below expectations for this winter. This could be counter seasonal supportive of chicken breast prices in the coming weeks. Last week, the ARA Chicken Breast Index was the lowest for any week since February 2006. Chicken wing prices are the cheapest for this time of year since 2013.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Increasing	Good	Higher
Wings (jumbo cut)	Decreasing	Good	Lower
Wing Index (ARA)	Decreasing	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)	Increasing	Good	Higher
Legs (whole)	Increasing	Good	Higher
Leg Quarter Index (ARA)	Increasing	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)	Increasing	Good	Lower
Turkey Breast, Bnls/Sknls	Increasing	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	Decreasing	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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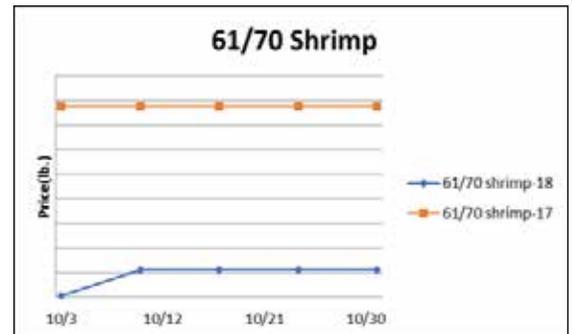
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Seafood

The shrimp markets continue to track below 2017 levels due in part to solid imports. During August, the U.S. imported 8.1% more shrimp than the previous year. The U.S. Dollar continues to track near decade highs compared to the Japanese Yen which could only encourage shrimp imports in the coming months. This should temper any gains for the holiday season.

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

Orange juice futures have fallen sharply during the last few months. The nearby futures market has declined 20% since peaking in July. The lack of adverse weather in Florida has weighed on orange juice prices. But, the downside price risk in orange juice from here is likely limited.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Steady	Good	Higher
Tomato Paste-Industrial (lb)	Steady	Good	Higher
Coffee lb ICE	Decreasing	Good	Lower
Sugar lb ICE	Increasing	Ample	Lower
Cocoa mt ICE	Increasing	Short	Higher
Orange Juice lb ICE	Decreasing	Good	Lower
Honey (clover) lb	Decreasing	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. Please see the general end dates for Salinas and start dates for Yuma. Cauliflower and Mandarins are both 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 and Cherry Tomatoes (East, West, and Mexico)
- Snow Peas
- Sweet Potatoes and Yams

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

Asparagus

The market is level. Baja stocks are sufficient; Peruvian supplies are tighter. Quality is best in Mexico: spears are deep green and tips are compact.

Avocados

Markets have firmed up after last week. Better demand and rain in the growing area's slowed down supply, while retail had aggressive promotions. There are some supply issues in MX after the rains, which could last about a week, this could bring the markets up a little higher than expected and cause a few delays at crossing. #2 fruit continues to be a small percentage of the overall pack out, keeping the market a few dollars less than the #1 market.

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 – East, West, and Mexico) – 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

ACT OF GOD Supply is still very short, especially with Hurricane Michael's direct impact on GA's new crop. Both Hurricane Florence and Hurricane 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, and limited supply from Central Valley & coastal CA are keeping FOBs high but steady. Quality is fair to good.

Berries:

Blackberries

The market is stable. The California season has ended. Mexican stocks are adequate. Quality is very good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels range from 12 to 13 Brix.

Blueberries

Although volume is a bit lower in both growing regions, prices are unchanged. California supplies continue to increase in Santa Maria. Domestic quality is very good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

Prices are level; California and new crop Mexican stocks are abundant. Flavor is sweet: sugar levels are moderately high, ranging from 13 to 14 Brix.

Strawberries

Prices are high; supplies are tight yet increasing. Santa Maria is the main growing region for new crop fall berries. The Salinas/ Watsonville, California season is ending. Overall quality is improving. Cold nights have caused some uneven color and reduced size a bit.

Bok Choy

Quality is average, and demand is fair.

Broccoli

Supplies are light this week and will continue to remain light as we transition to the desert. The demand is very good and the market continues to be strong.

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 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

Quality is very nice, with bright white color. Demand and markets are steady. Our supplies are slightly up right now.

Celery

Supplies are lower this week; however, markets are much better.

Cilantro

Supplies and demand are steady this week. Quality is fair to good.

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.



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Produce (continued)

Cucumbers

GA is still suffering from Hurricane Michael, but fortunately there is light volume coming from Plant City that is able to help the East. FOBs are down going into the week. Quality has been mostly good, but there are scattered impacts due to rains. The West is improving daily as volume ramps up through Nogales and McAllen. Baja is finally starting to build some decent numbers after all the recent rainfall. Because of this, FOBs are falling slowly. Quality has been mostly good, but there are some scattered impacts due to rains.

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

GA has decent supply considering Hurricane Michael. FL is looking to start in the next week. Weather permitting, it should be a smooth transition. FOBs are steady and quality is good. There is no shortage of eggplant out West as the transition starts to wrap up. FOBs are steady with great quality available. Good supply is available out of Nogales and quality is very nice.

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

EXTREME This market is still extreme but should see some relief in mid-November once the Mexican crops start producing again.

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 cone 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

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 Lettuce supplies continue to be severely below budget. Salinas finished last Saturday and we will be in Huron, only this week. Yuma is projected to start sometime next week. When that starts, it will be very light numbers. Quality has been good. The market has been active due to light supplies and increased demand from the Northeast and also from Canada.

Romaine

ESCALATED Supplies are below normal. In order to keep up with the overall demand, we are experiencing shortages and an increase in price. We should see improvement within two weeks after the transition from Salinas, CA and when Yuma, AZ starts producing.

Romaine Hearts

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

Limes

The market has inched up due to a significant drop in border crossings last week; overall supplies are adequate. Quality is good: spotting, styler, and premature breakdown are rain-related issues.

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. There are straight load red deals available in Washington below USDA market price. 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 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)

Supplies and demand are steady. Quality is good.



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Produce (continued)

Green Bell Pepper

ESCALATED Most of the mature pepper was lost in Hurricane Michael; however, surprisingly a lot of the young plants survived. Unfortunately, with the bloom drop, we are feeling the tight market pressure already. Supply Remains short but with Florida production ramping up, we are seeing the market ease back slightly. Quality is mostly good. California transition continues to the desert and markets are down in the west as well Quality in the west is outstanding while Mexico is still two weeks out. Supplies will remain snug through the middle of November.

Jalapenos (Chiles)

WATCH LIST Supplies on the East Coast are tight as local deals wind down. South Georgia product is lighter than expected due to Hurricane Michael, and Florida crops are slow to ramp up. Quality is fair and FOB prices are up an average of \$3-6 across the entire category. West Coast markets are very short as California recovers from rain showers and Mexico is suffering impacts of three hurricanes in the past 10 days.

Red and Yellow Bell Pepper

Prices are even higher than last week; stocks are extremely tight. Harvesting in the California desert and Western Mexico is approximately three weeks away. Quality ranges from fair to average: scarring is an issue.

Pineapple

The market is steady; supplies are adequate. Quality is very 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 and transportation has been a challenge.

Radishes

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

Salad Blends

Prices are rising, and quality has fallen. There have been reports throughout the industry of internal burn and mildew in raw product stocks. Inspectors are closely monitoring supplies so that finished 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%.

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

Prices are unchanged; stocks are sufficient. Quality is good: growers are preparing for the impending move south to Yuma, Arizona.

Sweet Potatoes and Yams

WATCH LIST 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

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 slightly.



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Produce (continued)

TOMATOES (EAST)

Rounds

WATCH LIST Quincy crops are now officially done. GA took some light damage from Hurricane Michael, but growers there have been more successful in 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. We are looking at relief coming around the 2nd week of November, or possibly 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 having been excellent.

Romas

ESCALATED - Still, little to no Eastern Romas are 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.

Grapes

ESCALATED - 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

WATCH LIST Cherry supply has been steady. No change in demand, supply, or FOBs. Good crisp quality is available.

Organic Tomatoes

Good supplies on organic tomatoes have ramped up from our grower.

TOMATOES (WEST)

Rounds

WATCH LIST The 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 November despite the escalated markets. Eastern Mexico production will be sporadic as growers work through the fields affected heavily by the rainfall received in the last 3 weeks. FOBs are actually 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

ESCALATED CA is done for the most part. There are still some growers harvesting. Additionally, Baja also has very light production; however, it is expected to start increasing volume in the next 10-14 days. FOBs are mixed this week, especially with the increased Eastern demand. Quality is mostly good, but some rain-affected defects are starting to appear.

Grapes

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

Cherries

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

Watermelons

Prices are steady; supplies are tight as domestic harvesting winds down and many growers move into Mexican regions for the new crop season. Overall quality is good: sugar levels range from 12 to 13 Brix.

