



MARKET TRENDS

FOR WEEK ENDING DECEMBER 21, 2018



MARKET TRENDS



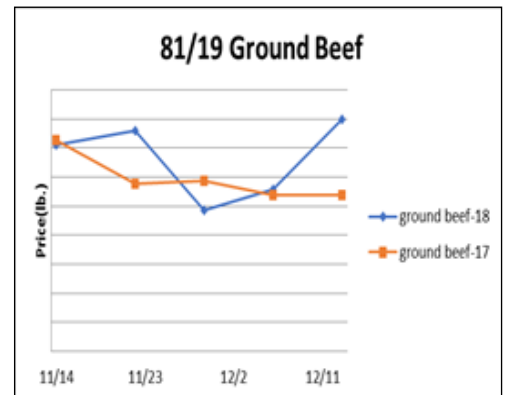
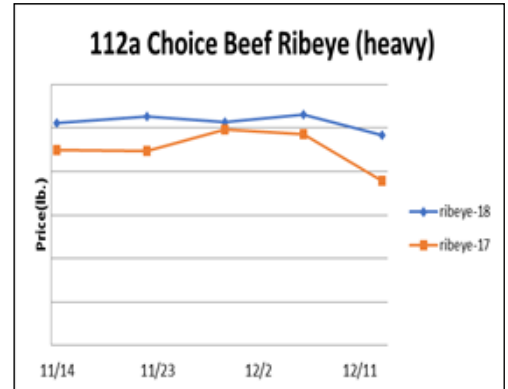
DECEMBER 21, 2018

PERFORMANCE
FOODSERVICE

Beef, Veal & Lamb

Last week's cattle harvest came in at a whopping 667k head, the largest kill of this year, boosting beef production 3.7% vs. the year prior. While production of this magnitude was relatively unexpected (especially for early December), it has become abundantly clear that favorable packer margins and aggressive beef demand will continue to push production schedules higher. From a global perspective, exports remain brisk, up 5.2% in October (yoy) which accounted for 13% of domestic output. Key Asian export partners, South Korea and Japan, continue to lead the pack, showing no signs of slowing. If global demand holds strong, expect beef market values to exceed expectations into early Q1.

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



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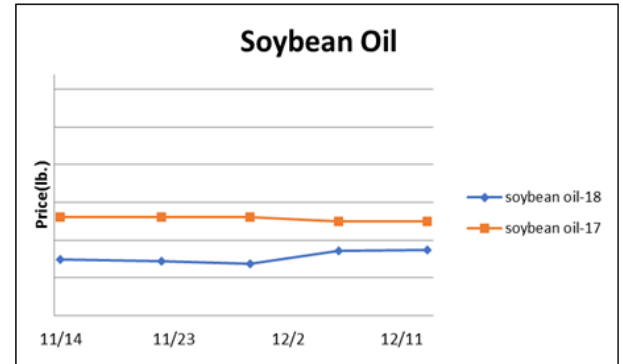
PERFORMANCE
FOODSERVICE



Grains

The wheat markets have been on the defensive in recent weeks as Russia continues to export strong volumes and the domestic 2019-20 crop generally improves. Speculation that Russia will limit its wheat exports this summer has generally dampened. But if they do, it could be supportive of the various wheat markets.

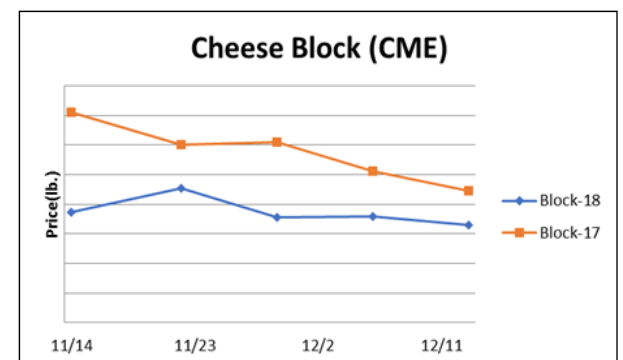
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Steady	Good	Higher
Distillers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



Dairy

Higher domestic butter prices are supporting U.S. imports. During October, U.S. butter imports were up 81.9% compared to the prior year and were the largest for any month since June 2014. In October, butter exports were 75% more than the prior year and best since June 2015. Still, the U.S. was a net importer by 1.9 million pounds during the month. History hints that lower butter markets will materialize for the remainder of the year. The cheese markets remain weak due in part to high stocks. But, the downside price risk from here for cheese is likely limited due in part to export demand.

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	Steady	Good	Lower
Class II Cream, heavy	Decreasing	Good	Higher
Class III Milk (CME)	Increasing	Good	Lower
Class IV Milk (CME)	Decreasing	Good	Higher



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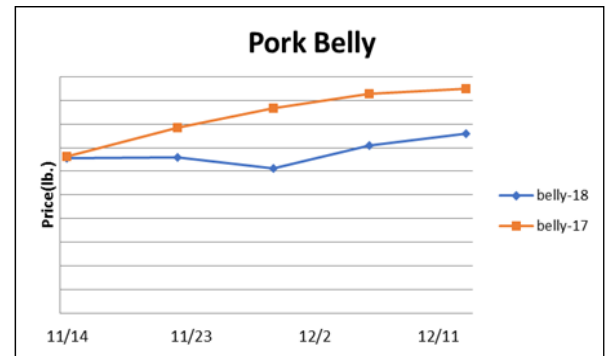
PERFORMANCE
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Pork

Despite a modestly larger slaughter schedule, pork production eased last week, down .4% from last year. Aggressive forward sales, plus stellar exports, continue lending support to the USDA pork cutout value. Wholesale ham prices were up 8% and bellies were up 10% from the previous week. In spite of those weekly price gains, the pork cutout was down 14% vs 2017. Despite ongoing trade woes, October pork exports were up 2.7% (yoy) and expectations are for further growth in 2019. And lastly, ASF remains a key concern for China.

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



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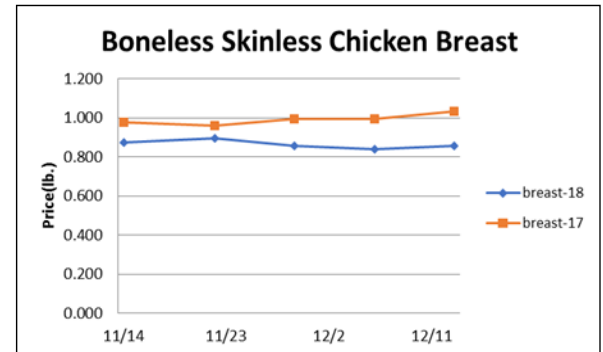
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Poultry

Chicken production for the week ending December 1st was up 35% from the previous holiday shortened week but was flat compared to last year. On a six-week rolling average basis, chicken production was up just .2%, but the six-week rolling average of chicks placed was down 0.9% from last year (the sharpest decline since November 2015). This suggests that chicken output gains could ease up heading into early 2019. Languishing U.S. chicken prices appear to have bought some international interest. October chicken exports were up 4.2% (yoy), notching the largest export total for the month since 2013, and the third best for any month on record. Strong exports are likely to persist which could support wholesale chicken prices next year.

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



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



Eggs

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

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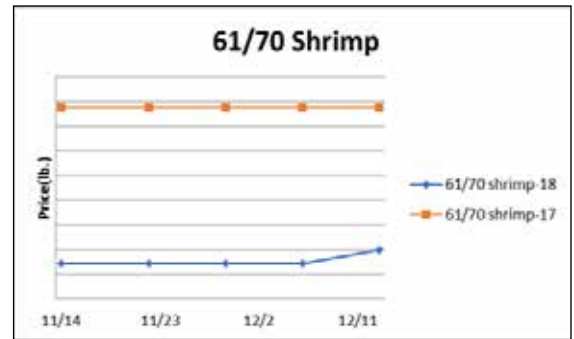
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Seafood

Snow crab imports suffered during October. For the month, the U.S. imported 18.2% less snow crab than the previous year. Further, those imports remained expensive due to the relatively tight world supply. World snow crab supplies are expected to remain relatively limited through the Alaskan Bering Sea snow crab season which could underpin the markets.

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	Increasing	Good	Higher
Tilapia Filet, frz	Decreasing	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
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	Oct-18	Sep-18	Aug-18
Beef and Veal	Decreasing	Decreasing	Decreasing
Dairy	Decreasing	Increasing	Increasing
Pork	Decreasing	Decreasing	Increasing
Chicken	Increasing	Decreasing	Decreasing
Fresh Fish and Seafood	Decreasing	Decreasing	Increasing
Fresh Fruits and Vegetables	Decreasing	Increasing	Decreasing

Various Markets

After making a nine-month high in October, nearby Arabica coffee futures have fallen 22.2% (from that high). For the 12-month period ending in October, world coffee exports were up 4.2% year-over-year. Arabica coffee futures may revisit the multi-year low of \$.935 set during September.

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



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Produce

Market Overview

Market disruptions from the CDC Romaine advisory along with the winter growing season experiencing cooler than normal temperatures have caused many items to be in very EXTREME markets and we have yet to see much relief. Broccoli, cauliflower, kale, iceberg, green leaf, spring mix, arugula, and spinach crops have slowed down with higher demand. The fields are experiencing lower yields, lighter weights, and poor quality. Overall available volumes/yields are expected to be lower over the next couple of weeks with anticipated higher prices. Strawberries are EXTREME.E.

WATCH LIST

- Cantaloupes
- Mixed Chili Pepper (Anaheim, Poblano, Serrano)
- Sweet Potatoes and Yams

Apples & Pears

Prices are steady; storage supplies are ample. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 14 to 18 Brix. Pear prices are unchanged. Sugar levels range from 12 to 14 Brix.

Artichokes

Supplies industry-wide are fair. Prices are higher on large artichokes and steady for small sizes.

Arugula

EXTREME Quality is fair due to cold weather preventing the product from sizing up.

Asparagus

The market is up. Stocks are tight in both growing regions. Mexican quality is best: spears are deep green and tips are compact.

Avocados

The industry has quickly replenished supply with record harvest over the last few weeks. There is an expectation for things to stabilize once appropriate harvest and demand levels align. It is the consensus that Mexico still has a good amount of fruit on the tree and the hope is for a smooth and seamless harvest from this region for the foreseeable future.

Bananas

Banana quality has come back in line with quality expectations for this time of year. Supplies are good and should remain steady for the remainder of the year.

MARKET ALERT

- **Arugula – EXTREME**
- **Broccoli – EXTREME**
- **Brussel Sprouts - ESCALATED**
- **Cauliflower- EXTREME**
- **Celery – EXTREME**
- **Kale - ESCALATED**
- **Lettuce (Iceberg, Butter, Green and Red Leaf) – EXTREME**
- **Lettuce (Romaine) – ESCALATED**
- **Mixed Chili Pepper (Jalapeno) - ESCALATED**
- **Mushrooms – ESCALATED**
- **Red Peppers – ESCALATED**
- **Red Cabbage – ESCALATED**
- **Spinach (Baby & Clip) – EXTREME**
- **Spring Mix – EXTREME**
- **Strawberries - EXTREME**
- **Tomatoes (Rounds, Romas and Grapes) – ESCALATED**



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Produce (continued)

Beans

Florida's green bean supply is adequate to meet this week's pre-holiday demand spike and quality is good. Meanwhile, Mainland Mexico production continues to see stronger numbers as growers move deeper into harvests.

Berries:

Blackberries

The market is slightly higher than last week; Mexican stocks are average. Quality is very good: berries are plump and juicy with sweet, slightly tangy flavor. Sugar levels range from 12 to 13 Brix.

Blueberries

Prices are beginning to inch up. Mexican and South American supplies are starting to tighten. Quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

Prices are high; supplies are abundant, but strong demand is pushing up markets. Quality is very good: sugar levels range from 13 to 14 Brix.

Strawberries

Prices are elevated. Rain continues to affect growing conditions in California and Florida, limiting availability. Shortened shelf-life remains a problem. Quality is average: bleeding and bruising are industry-wide issues.

Bok Choy

Quality is average, and demand is fair.

Broccoli

Stocks are starting to increase, but high markets persist. Hollow core and pin rot are industry-wide issues that are being culled at the field level.

Brussels Sprouts

ESCALATED Brussels sprout supplies are low and prices are higher.

Cantaloupe

We are done here in the Arizona and California deserts, and have started receiving some light volumes here on the west coast and volumes will start to increase each week going forward. The east coast has better volumes than we do here on the west but still a pretty strong Market. The overall quality is good, with a green cast and very firm fruit, the brix is around 12 but eat a little flat. Interior color is good to fair, but as we progress through the month we will see better eating fruit.

Carrots

We are seeing both good quality and volume.

Cauliflower

The market has eased; supplies are ample. Quality is good: discoloration and uneven size are minor issues.

Celery

Prices are climbing; demand is strong. A disease called Fusarium is limiting supplies in all growing regions; pith and growth cracking are problems as well.

Cilantro

Supplies are fair, and quality is improving.

Corn

Steady supply and good quality out of Florida.

Cucumbers

Although some farms have received a little rain, cucumber production out of Mexico continues to increase daily with strong quality on the fruit. However, cooler weather has slowed down South FL's production so there's less product available in the East. Despite the cold, quality continues to be nice. Honduras growers are bringing a little product in, but volume will remain on the light side until after the first of the year.



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Produce (continued)

Eggplant

Florida growers continue to provide good supply and quality on eggplant despite the cooler weather. Expect to see more choice fruit over the next few weeks as farms work older fields. In the West, Mexico's supply is coming on strong while the CA desert is in its last week of production.

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.

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

We are still going here in 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 end of the season, also we will be shed packing some fruit as well to look over quality. We will have snack packs if you have any interest please let us know. The first of the Chilean will also start arriving just after Christmas here on the west coast and around the 21st on the east coast, there is some Peruvian Reds and Greens on the east coast now.

Green Cabbage

Supplies are improving and priced are trending downward.

Red Cabbage

ESCALATED Supplies are lower than normal and prices are rising.

Green Onions

Iced: Supply, demand and quality are good. Iceless: Similar to iced, supply, quality and demand are all good.

Honeydew

Market strong as well as Mexico is our main source of volume, we will see some of the Guatemalan fruit coming in about 2 weeks, we anticipate the market to keep strong. The overall quality of the fruit is fair to good with some of the weather causing some discoloration and heavy scarring, the fruit has gone through some tough weather and it shows.

Jicama

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

Kale (green)

ESCALATED Quality is fair due to cold weather preventing the product from sizing up.

Lemons

Market is steady and stronger as we are going out of Dist. 3 and also here in Dist. 1. 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. We will be finishing Dist. 3 around the end of January; the overall quality is good and will continue to get better as our color gets better in the field and we are gassing less hours.



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Produce (continued)

Lettuce:

Butter

EXTREME Quality is good with limited supplies.

Green Leaf

EXTREME Quality is good with limited supplies. Product is small, due to cold weather.

Red Leaf

EXTREME Supplies are tight, quality is good.

Iceberg Lettuce

EXTREME We will continue to struggle with slow harvest, due to the rain from last weekend. Demand continues to be higher than supplies. We have been covering contracts and regular orders but are struggling to cover any open market. The market will continue to be active this entire week.

Romaine

ESCALATED Quality is good, and supplies are back to normal this week.

Romaine Hearts

ESCALATED Supplies are normal, and quality is good.

Limes

The market is weak. Although volume is high, 200-count and smaller sizes are fairly limited. Quality is good: scarring is minimal.

Napa

Demand, supply, and quality are all good.

Onions

The market is flat!!! Prices are low; supplies are sufficient. Onions from Mexico will enter the market in early February; Texas-grown stocks will be available in early March. Storage quality is excellent in Idaho/Oregon.

Oranges

We are going full swing on the 2018/2019 California navel crop 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 we are experiencing some rain today and the forecast is for rain on and off through December, so we will pray that is the case, this will help size up the fruit. The overall sugar has been around 12 brix, so fruit does eat well and will only get better in the coming weeks with our fluctuation in temperature and the rains. Also, the navels are being gassed about 24-48-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.



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Produce (continued)

Parsley(Curly, Italian)

Quality is fair, due to cold weather preventing the product from sizing up.

Green Bell Pepper

Florida's pepper supply has improved as a few more growers have gotten up and running with Winter crops. Growers on the East Coast side of the state were expecting a big start but have been a little slow to get into volume. With most growers in crown picks, harvests are heavier to jumbos with very few off grades available. Overall quality from current production areas (Palmetto, Immokalee and the East Coast) is mostly good. In the West, CA is winding down quickly with very little volume and weak quality. Fortunately, Mainland Mexico is producing more peppers despite a gain-stall-gain-stall pattern. Quality from early picks has been with good color, strong walls, and healthy cavities.

Jalapeños (Chiles)

With various growing areas in Mexico suffering crop loss, re-planting, and experiencing cold weather, the chili pepper situation remains critical. Supply will remain tough until mid-January, when replanted crops come to maturity. Unfortunately, FL farms don't have much product to help with supply. Tomatillos and Serrano's have become extremely difficult to find.

Red and Yellow Bell Pepper

Expect prices to start easing after growers fully transition from California to Mexico (later this week). Florida stocks remain tight but are beginning to increase. Quality is fair: scarring is an industry-wide problem.

Pineapple

The market is elevated; supplies are tight in Costa Rica and Mexico (into Texas). Quality is good: fruit is firm, yet juicy, with sweet, slightly tangy flavor. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

The market is mostly unchanged. Size is dominated by 80- to 100-count sizes. Expect to see more abundance of smaller potatoes from Washington.

Radishes

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

Salad Blends

Prices are up. Inspectors are closely monitoring finished packs for chunks and core material to achieve the best quality.

Snow Peas

Volume will start falling next week and prices will start rising.

Sugar Snap Peas

Product continues to be tight.



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Produce *(continued)*

Spinach (Bunched)

EXTREME Very limited supply and quality is fair, due to cold weather preventing the product from sizing up.

Spinach (Baby)

EXTREME Very limited supply and quality is fair.

Spring Mix

The market is level. Supplies are starting to increase, but shelf-life may suffer due to low temperatures. Quality is good: purple shade is a problem in chards.

Yellow Squash/Zucchini

With squash being sensitive to recent cold weather, availability is down this week. Both Mexico and Florida's crops have lightened up from the recent cooler temps. Volume will pick up as the weather warms, but it may be another 7-10 days before we see a significant change. Quality is challenging on yellow (especially in FL), but okay on zucchini.

TOMATOES EAST

Palmetto/Ruskin growers are finishing up any remaining crown picks on round tomatoes this week and will be moving into 2nd and 3rd picks for the remainder of the season. Quality has remained nice on crown picks, but there have been reports of several concerns (including decay) with fruit from later harvests. Production has mostly transitioned to the Naples/Immokalee area where quality is nice, but size is short. Look for volume to remain mostly steady until after Jan 1st when weather patterns generally warm up and more southern FL farms come into Winter crops. Roma availability continues to be light, while grape tomato numbers have been steady.

TOMATOES WEST

Baja and Eastern Mexico continue to harvest round and Roma tomatoes but are definitely winding down. Slow to start, West Mexico farms have finally gotten into new Roma crops and will see volume increase weekly as more growers get into the mix. Round tomato production is still limited out of Mainland Mexico, but gradual increases are expected throughout the month. Baja's grape tomato shipments are down to the nitty gritty and Nogales shippers saw a slow-down due to cool weather, keeping things snug this week. As with other tomato varieties, more growers will be starting up soon and supply should begin to build by the New Year.

Watermelons

Prices have inched up; supplies are available from offshore (on the East Coast) and Mexico (into Nogales, Arizona). Quality is good: sugar levels range from 12 to 13 Brix.

