



MARKET TRENDS

FOR WEEK ENDING DECEMBER 7, 2018



MARKET TRENDS

DECEMBER 7, 2018

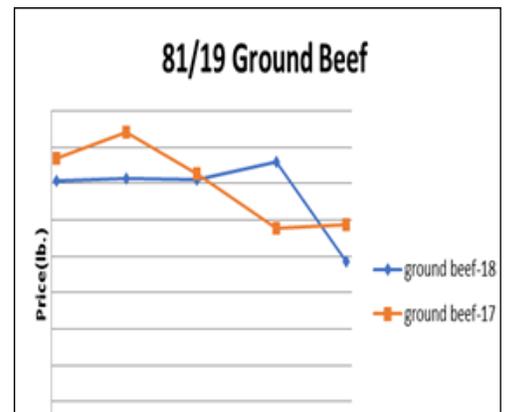
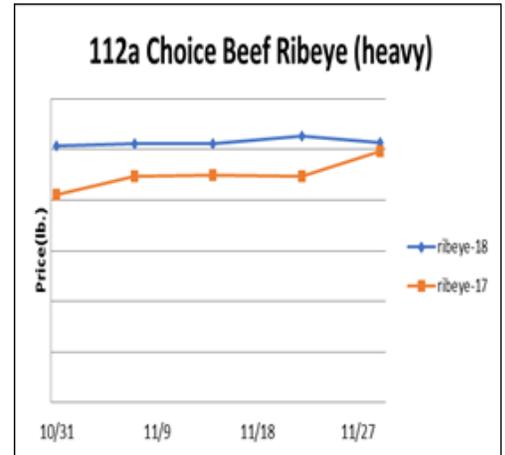
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Last week's holiday shortened harvest came in at an estimated 570,000 head, just 0.9% under last year, but sharply lower carcass weights dropped total beef production 2.5% below 2017. Tighter cattle supplies appear to be weighing on production and are expected to temper year-over-year gains into the winter months. The USDA Cattle on Feed report confirmed expectations for reduced October placements, down 6.1% from the prior year. Cattle marketed throughout October were up 4.8% (with one extra marketing day this year), narrowing November 1st on-feed inventories to a 3.2% year-over-year increase; the first non-record monthly inventory total in five months.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Lower
Feeder Cattle Index (CME)	Increasing	Short	Lower
Ground Beef 81/19	Decreasing	Good	Lower
Ground Chuck	Increasing	Good	Lower
109 Export Rib (ch)	Increasing	Good	Higher
109 Export Rib (pr)	Increasing	Good	Lower
112a Ribeye (ch)	Decreasing	Good	Higher
112a Ribeye (pr)	Increasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Increasing	Good	Lower
116 Chuck (sel)	Decreasing	Good	Higher
116 Chuck (ch)	Increasing	Good	Higher
116b Chuck Tender (ch)	Decreasing	Good	Higher
120 Brisket (ch)	Increasing	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)	Increasing	Good	Lower
168 Inside Round (ch)	Decreasing	Good	Lower
169 Top Round (ch)	Decreasing	Good	Lower
171b Outside Round (ch)	Decreasing	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)	Decreasing	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	Lower
185c Loin, Tri-Tip (ch)	Increasing	Good	Lower
189a Tender (sel, 5 lb & up)	Decreasing	Good	Higher
189a Tender (ch, 5 lb & up)	Decreasing	Good	Lower
189a Tender (pr, heavy)	Increasing	Good	Lower
193 Flank Steak (ch)	Increasing	Good	Higher
50% Trimmings	Decreasing	Good	Higher
65% Trimmings	Decreasing	Good	Lower
75% Trimmings	Steady	Good	Lower
85% Trimmings	Increasing	Short	Lower
90% Trimmings	Increasing	Short	Lower
90% Imported Beef (frz)	Decreasing	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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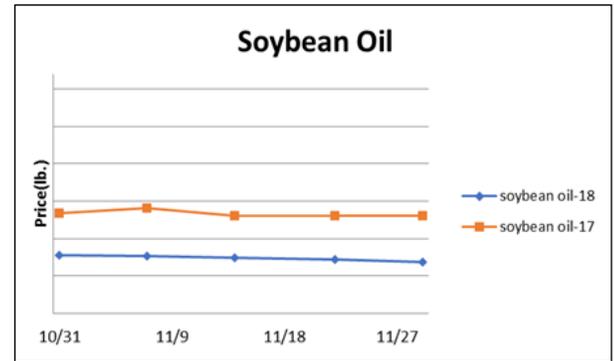
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Grains

The domestic 2019-20 winter wheat crop is progressing under generally favorable conditions. As of November 25th, 95% of the crop was seeded and 55% of the crop was rated in either good or excellent condition. In same week last year, just 50% of the crop was rated either good or excellent. This may temper the upside in wheat prices.

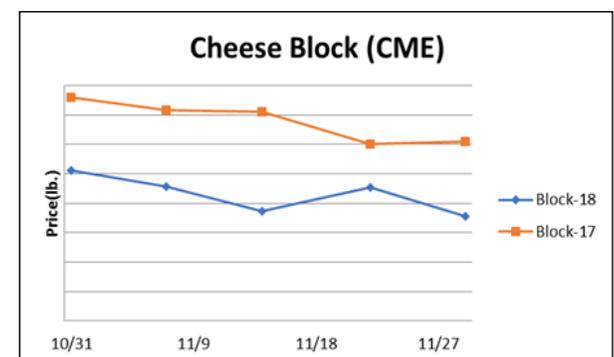
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Higher
Distillers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



Dairy

Low dairy prices continue to curb milk production growth in the U.S. During October, U.S. milk output was just .8% bigger than the previous year due to a 1.1% gain in milk per cow yields and a .3% smaller milk cow herd. Milk farmers reduced the herd during the month by a net 2,000 head making it the smallest since February 2017. Recent milk cow slaughter has been strong which suggests that milk production expansion should be tempered through the end of the year. The cheese markets remain at deflated levels. The butter market usually moves lower in December.

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	Higher
Nonfat Dry Milk	Decreasing	Ample	Higher
Whey, Dry	Decreasing	Good	Higher
Class 1 Base	Decreasing	Good	Lower
Class II Cream, heavy	Decreasing	Good	Higher
Class III Milk (CME)	Decreasing	Good	Lower
Class IV Milk (CME)	Decreasing	Good	Higher



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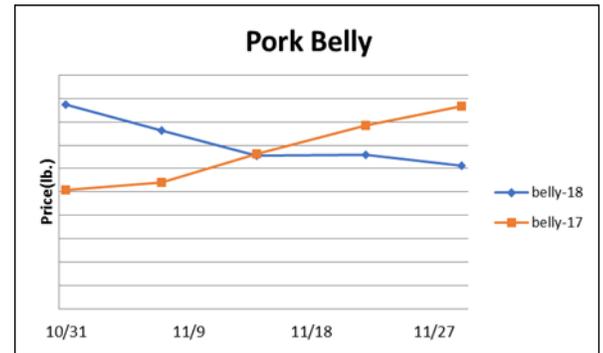
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Pork

Pork production was down 13% from the non-holiday week prior but came in 5% over last year's Thanksgiving harvest. Pork production continues running well above a year ago, but active sales (both forward and export) continue to portend a bottom is forming heading into year's end. The belly primal has fallen from its late October counter-seasonal peaks, moving more in line with a typical season that suggests risk remains to the upside on the belly market from late November into early February.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Decreasing	Ample	Lower
Sow	Decreasing	Ample	Higher
Belly (bacon)	Decreasing	Good	Lower
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)	Decreasing	Good	Lower
Picnic, untrmd	Decreasing	Good	Lower
SS Picnic, smoker trm box	Decreasing	Good	Lower
42% Trimmings	Increasing	Good	Lower
72% Trimmings	Increasing	Good	Lower



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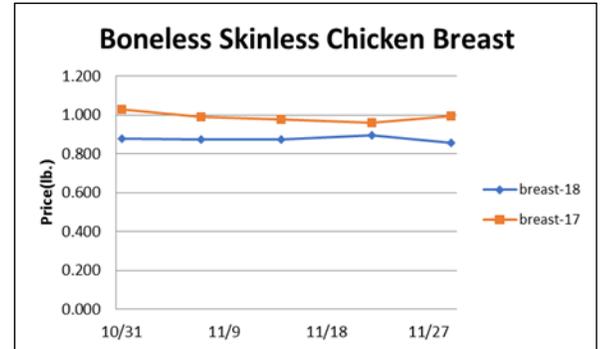
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Poultry

For the week ending November 17th, chicken slaughter declined 3.96% from the week prior and was 1.4% below a year ago. Languishing chicken prices continue to hamper integrator margins, dissuading placement activity. Based on preliminary chick placements, estimates for slaughter levels into year's end remain lackluster, forecast down nearly 3% year-over-year. As Thanksgiving came and went, turkeys in cold storage as of October 31st fell in accordance with a traditional seasonal pattern, as retail demand for the frozen birds ramped up. Despite aggressive retail price features, with price features as low as \$0.29 per pound, retail ads on whole birds were down 2% (yoy) for the week of Thanksgiving.

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



Eggs

Description	Market Trend	Supplies	Price vs. Last Year
Large Eggs (dozen)	Increasing	Short	Lower
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	Steady	Short	Lower

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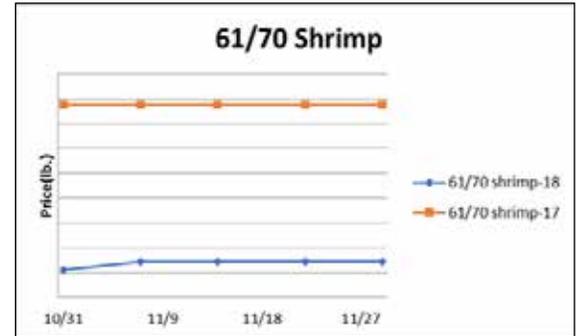
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Seafood

As of this week, NOAA Fisheries Service is reporting none of the 2018-19 Alaskan Bering Sea snow crab had been landed which is not unusual. Typically, almost all of the Alaskan snow crab fishing occurs in the winter. The Alaskan quota this year is 27.6 million pounds, up 50% from last year's small quota. Still, snow crab prices could remain elevated.

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	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	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 cocoa market continues to track above last year's low price levels. World cocoa supplies are adequate which has tempered the upside in the market during the fall. However, an El Nino weather pattern could shorten output in 2019. The risk in cocoa prices is to the upside.

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	Steady	Ample	Lower
Cocoa mt ICE	Decreasing	Short	Higher
Orange Juice lb ICE	Increasing	Good	Lower
Honey (clover) lb	Decreasing	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. Broccoli, cauliflower, 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. Romas are in an ACT OF GOD; however, limes are a good buy.

WATCH LIST

- Mixed Chili Pepper (Jalapeno, Anaheim, Poblano, Serrano)
- Snow Peas
- Sweet Potatoes and Yams

Apples & Pears

Apples: There are great supplies of all apple varieties out of Washington, New York, California, Pennsylvania, Michigan. Quality is at its best.

Pears: New crop Bartlett pears have started with good supply available especially on the larger (70's to 100's) sizes. New crops of Bosc and D'Anjou pears are also now available.

Artichokes

Quality is excellent, and demand is good.

Arugula

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

Asparagus

Prices are steady but should increase after next week in preparation for Thanksgiving. Mexico had good volume and quality. Peru is slowing down and volume is light. Quality is good.

Avocados

Prices are slightly lower than last week. Although increasing, Mexican volume will remain low for another week or two.

Bananas

Banana issues have been reported with a higher frequency over the last week due to some recent adverse growing conditions in the tropics. We should find our way out of this soon.

Beans

EAST: As weather has been clear and warm the last few weeks in Florida, and Thanksgiving in the rearview mirror, there are plenty of beans to go around. FOBs are down, and quality is excellent.

WEST: Limited supply from central valley & coastal California are keeping FOBs high, but steady. Things will improve once MX kicks up their season in a few weeks. Quality is fair to good.

MARKET ALERT

- Arugula – EXTREME
- Broccoli – EXTREME
- Cauliflower – EXTREME
- Celery – EXTREME
- Green Peppers – ESCALATED
- Lettuce (Romaine, Iceberg, Butter, Green and Red Leaf) – EXTREME
- Mushrooms – ESCALATED
- Spinach (Baby & Clip) – EXTREME
- Spring Mix – EXTREME
- Sugar Snap Peas – EXTREME
- Tomatoes (Romas) – ACT OF GOD/
FORCE MAJUERE



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Produce (continued)

Berries:

Blackberries

The market is unchanged. Mexican volume is high. Quality is very good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels range from 12 to 13 Brix.

Blueberries

Prices are stable. Mexican and South American stocks are sufficient. Overall quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

Prices are high; expect tight supplies for another week at least. Quality is very good: sugar levels range from 13 to 14 Brix.

Strawberries

Prices remain elevated. More rain is in this week's California forecast; expect extremely tight stocks. Shortened shelf-life will be a concern over the next week. Quality is average: bleeding and bruising are issues.

Bok Choy

Quality is average, and demand is fair.

Broccoli

The market is elevated. Cold weather and increased processor demand have reduced supplies for several weeks, yet Mexican volume is starting to climb. Hollow core and pin rot are industry-wide quality problems reducing stocks.

Brussels Sprouts

Brussels sprout supplies are plentiful, and quality is great.

Cantaloupe

Market very tight on all melons as the desert has been a rough go with all the weather and they have been stretching it out as long as possible to bridge the gap between south American fruit. The first arrivals are sitting on the boats here on the west coast and longshoremen are causing trouble and not unloading boats at this point, we hope the situation gets resolved soon, we will keep you posted. The east coast Offshore fruit has been coming in, but light volumes and we are anticipating some better volumes in the next couple weeks. The first arrivals have looked good a bit of a green cast and very firm fruit, descent interior color.

Carrots

We are seeing both good quality and volume.

Cauliflower

EXTREME Supplies remain tight, while the market is very active. Quality is good.

Celery

EXTREME: With the Salinas growing season finished, Oxnard quality and supplies are very light. Total volumes are VERY light, and the market will continue to stay high.

Cilantro

Supplies are fair, and quality is improving.

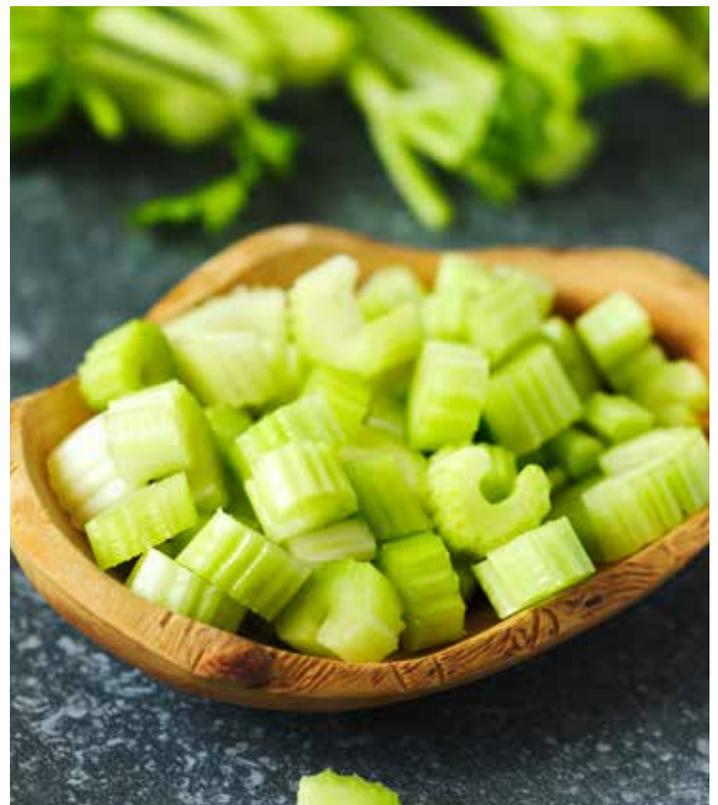
Corn

Florida corn is getting better with the transition.

Cucumbers

EAST: Central and South Florida have decent numbers for now, but things are tightening up just a hair. This is putting some slight upward pressure on FOBs. Honduras has begun in a light way but will not ramp up for another few weeks. Quality is excellent.

WEST: Baja will continue their seasonal decline for the next few weeks. Meanwhile, western and northern MX have good supply in the mix. FOBs are steady with excellent quality available.



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Produce (continued)

Eggplant

EAST: Florida's numbers are a little light, but there seems to be enough volume to meet demand. FOBs are steady with good quality available.

WEST: With rain and cool weather in the forecast, we could see the CA desert supply start to drop quicker than expected. However, mainland MX's supply is ramping up, so we should not see any major shortages of eggs. FOBs are steady, and quality is good to excellent.

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 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 to arrive in about 2 weeks and there is some Peruvian on the east coast now.

Green Cabbage

Supplies are improving and priced are trending downward.

Red Cabbage

Supplies are improving, and prices are trending downward.

Green Onions

Iced supplies are plentiful and volume from Northern Mexico has gradually increased over the past seven days. Market pricing is decreasing daily making it a perfect time to promote on menus. Iceless: Similar to iced, supplies have been increasing over the past seven days. Demand has slowed due to higher prices for the past ten days.

Honeydew

Market strong as well as Mexico and a few Arizona honeydews, 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)

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

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 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.

Lettuce:

To receive the most updated information on Romaine lettuce, we advise following the CDC and FDA issued advisories summarized here:

<https://www.cdc.gov/ecoli/2018/o157h7-11-18/index.html>

<https://www.fda.gov/NewsEvents/Newsroom/PressAnnouncements/ucm626716.htm>

Butter

EXTREME Quality is fair 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, demand is good, and quality is fair.

Iceberg Lettuce

EXTREME Supplies continue to be lower than normal. Demand continues to be above normal due to the shortage of other items. Quality is good; however, we are expecting active markets.

Romaine

EXTREME Quality and supplies are both fair, but demand is good.

Romaine Hearts

EXTREME Supplies are lighter than normal, and quality is fair, but demand is good.

Limes

The market is weak; supplies are ample. Quality is average; scarring is minimal..

Napa

Demand, supply, and quality are all 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 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 good and will only get better in the coming weeks with our fluctuation in temperature and the rains. Also the navels are being gassed about 48-72-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 is fair, due to cold weather preventing the product from sizing up.



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Produce (continued)

Green Bell Pepper

EAST: Supply is still very light in FL due to lower plant yields and less acreage (some have stepped away from growing pepper completely this year!). Big fruit is still very snug with higher FOBs, while choice is slipping just slightly. Things are expected to shape back up around mid-December when South Florida gets rolling. Quality is good to excellent.
WEST: CA still has a handful of pepper, but not enough to go around. Meanwhile, MX is about 5-7 days away from any real volume. Big fruit is still very snug with higher FOBs, while choice is slipping just slightly. Things should improve over the next 14 days as the pipeline refills. Quality is excellent.

Jalapeños (Chiles)

WATCH LIST Chili peppers are tight across the country due to weather-related issues in all growing regions. Expect very high prices and very short supply due to lower yields, poor quality and disease.

Red and Yellow Bell Pepper

Prices are elevated. East Coast supplies are starting to increase, but the Mexican season is two to three weeks away. Overall quality is fair: scarring remains an industry-wide problem.

Pineapple

The market remains high; stocks are tight. Quality is average: sugar levels range from 13 to 16 Brix.

Idaho Potatoes

Large Burbank's are a little short in supply right now. The Burbank market, 80cts and larger, has been more active as fob prices are up over the past 10 days. The Norkotah market has been mostly flat on all sizes. If you are looking for larger potatoes and are not variety sensitive Norks are the way to go right now.

Radishes

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

Salad Blends

The CDC and the FDA are allowing product not from the implicated regions of Central and Northern California and harvested on or after November 23, 2018 to enter the market. Our Peak growers have fully transitioned to the Yuma, Arizona region, romaine products have begun to slowly re-enter the market.

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 possibly prorated.

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)

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

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

Sweet Potatoes and Yams

WATCH LIST This market has spiked due to heavy damage in the Carolinas.



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Produce (continued)

Yellow Squash/Zucchini

EAST: Zucchini is readily available, however yellow squash is still a bit snug. Zucc FOBs are steady while Yellow Squash is slightly up. Zucc quality is excellent, but yellow squash has slipped a bit with some scarring.

WEST: Zucchini is readily available, however yellow squash remains very tight. FOBs are steady on zucchini, but up once again for yellow. Quality is excellent for zucc and fair for yellow squash.

TOMATOES (EAST)

Rounds

Ruskin/Palmetto, Labelle, and Immokalee are all actively harvesting at this time. Ruskin is on the downhill slide with numbers decreasing weekly, while Immokalee is just starting to scratch the surface (no real volume from the area yet). Sizing yields are very tight on XLG while LG and MD are a bit more available. As we come off the Thanksgiving holiday, demand is down significantly. Thus, with supply and demand in limbo, we are seeing FOBs shift. XLG are steady while LG & MD are down a few dollars. We are still in a trigger situation as yields are at or below average. Quality is excellent.

Romas

Ruskin/Palmetto, Labelle, and Immokalee are all actively harvesting at this time. All regions have below average yields which is keeping a firm press on FOBs. Depressed demand after the holiday is putting some downward pressure on pricing, however, we do not expect this to continue to decline. As demand settles over the next 10 days, the pricing market will settle as well and possibly rise again slightly. This market will continue until South Florida really ramps up towards the end of December. We are still in a trigger situation until supply improves. Quality is excellent.

Grapes

Ruskin/Palmetto, Labelle, and Immokalee are all actively harvesting at this time. Although yields are still somewhat light, we are seeing relief faster on grapes than other varieties. FOBs are beginning to fall slightly, however, we are still in an active trigger situation. Quality is good to excellent.

Cherries

Ruskin/Palmetto, Labelle, and Immokalee are all actively harvesting at this time. Yields are still light, which is keeping pressure on FOBs. No change week over week regarding pricing. Quality is mostly good.

TOMATOES (WEST/MEXICO)

Rounds

Not much change out west. Both Eastern MX & Baja have tight supplies due to cool weather. No significant change is expected until late December when Mainland MX will begin. Until then, demand still turns to the already light supplied eastern fruit. FOBs are down slightly due to a drop-in demand after the holiday week. Because supply is still very tight, we remain in a trigger situation in for western fruit. Quality is excellent.

Romas

Not much change out west. Both Eastern MX & Baja have tight supplies due to cool weather. No significant change is expected until late December when Mainland MX will begin. FOBs are down slightly due to a drop in demand after the holiday week. Because supply is still very tight, we remain in a trigger situation in for western fruit. Quality is excellent.

Grapes

A little more product is funneling through the channels, however, still not enough supply to cover demand. Thus, we remain in a trigger situation. Relief is expected in late December when Mainland MX begins. Quality is good to excellent.

Cherries

A little more product is funneling through the channels, thus putting some downward pressure on FOBs. Things will remain a bit snug until the end of December. Quality is good to excellent.

Watermelons

Prices are stable; supplies are sufficient. Quality is good: sugar levels range from 12 to 13 Brix. Offshore melons will hit the market next week.

