



MARKET TRENDS

FOR WEEK ENDING APRIL 6, 2018

 **PERFORMANCE**
FOODSERVICE



MARKET TRENDS

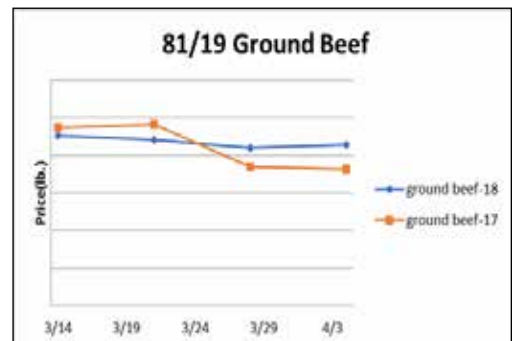
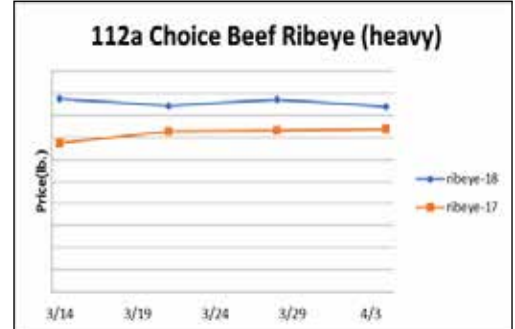
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Beef, Veal & Lamb

Beef production last week declined 2.3% but was still .4% larger than the same week a year ago. Strong annual gains in weekly beef output are expected this spring. Retailers are planning to actively feature beef shortly. Over the last four weeks, total beef shipments were the biggest for any four-week period since last September. Solid retail demand should support beef prices in the coming weeks. Plenty of the feature activity is planned around ground beef. February 28th boneless beef stocks were down 10.1% from last year and were the smallest for the month since 2014. Since 2013, the average move for the 81/19 ground beef market over the next 8 weeks was up 13.4%.

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	Higher
Ground Chuck	Increasing	Good	Higher
109 Export Rib (ch)	Decreasing	Good	Higher
109 Export Rib (pr)	Increasing	Good	Lower
112a Ribeye (ch)	Decreasing	Good	Higher
112a Ribeye (pr)	Decreasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Decreasing	Good	Higher
116 Chuck (sel)	Increasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Higher
116b Chuck Tender (ch)	Decreasing	Good	Lower
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)	Decreasing	Good	Higher
121e Cap & Wedge	Decreasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Lower
168 Inside Round (ch)	Decreasing	Good	Higher
169 Top Round (ch)	Decreasing	Good	Lower
171b Outside Round (ch)	Decreasing	Good	Higher
174 Short Loin (ch 0x1)	Decreasing	Good	Lower
174 Short Loin (pr 2x3)	Steady	Good	Higher
180 0x1 Strip (ch)	Decreasing	Good	Lower
180 0x1 Strip (pr)	Increasing	Good	Lower
184 Top Butt, boneless (ch)	Decreasing	Good	Lower
184 Top Butt, boneless (pr)	Steady	Good	Lower
184-3 Top Butt, bnls (ch)	Decreasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Higher
185c Loin, Tri-Tip (ch)	Decreasing	Good	Higher
189a Tender (sel, 5 lb & up)	Decreasing	Good	Lower
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	Increasing	Good	Lower
65% Trimmings	Increasing	Good	Higher
75% Trimmings	Steady	Good	Higher
85% Trimmings	Increasing	Short	Higher
90% Trimmings	Decreasing	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)	Decreasing	Good	Higher



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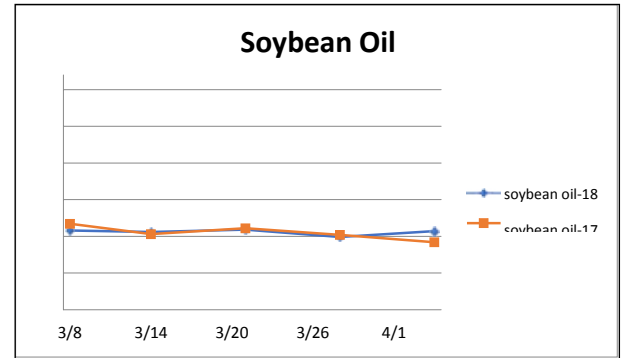
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Grains

The domestic winter wheat crop continues to struggle despite recent rainfall. As of April 1st, just 32% of the crop was rated by the USDA in either good or excellent condition. This compares to 51% for the same date last year and is the worst rating for the date in over a decade. This could support prices in the near term.

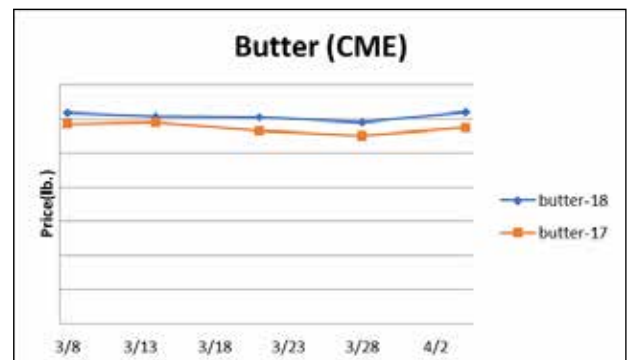
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Higher
Crude Soybean Oil, lb	Increasing	Good	Higher
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher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



Dairy

The CME cheese markets remain relatively range-bound due in part to solid U.S. output and ample supplies. Seasonally expanding milk and dairy product output are expected to temper any upside in cheese prices in the coming weeks. Yet, solid exports are likely to temper the downside risk for cheese. Longer-term, burdensome world skim milk powder and nonfat dry milk inventories should mitigate any upside moves in the cheese markets. The butter market has been fairly range-bound as well. CME butter prices may have a hard time getting below \$2/lb. for the next several months.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Decreasing	Good	Lower
Cheese Blocks (CME)	Increasing	Good	Higher
American Cheese	Decreasing	Good	Higher
Cheddar Cheese (40 lb)	Decreasing	Good	Higher
Mozzarella Cheese	Decreasing	Good	Higher
Provolone Cheese	Steady	Good	Same
Parmesan Cheese	Decreasing	Good	Higher
Butter (CME)	Increasing	Good	Higher
Nonfat Dry Milk	Steady	Ample	Lower
Whey, Dry	Decreasing	Good	Lower
Class 1 Base	Steady	Good	Lower
Class II Cream, heavy	Decreasing	Good	Higher
Class III Milk (CME)	Increasing	Good	Lower
Class IV Milk (CME)	Increasing	Good	Lower



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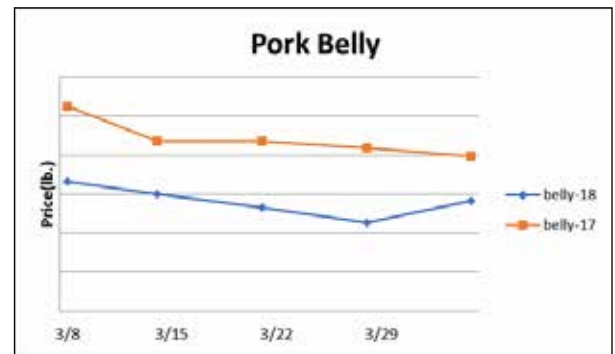
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FOODSERVICE



Pork

Pork production last week fell .5% but was 2.7% better than the same week a year ago. Recent hog and pig inventory data hints that strong year-over-year pork output gains will occur for the next several months. The March 1st U.S. hog and pig herd was 3.1% larger than last year, with all weight classes being up at least up 3%. Further, the swine breeding herd was 1.7% bigger than 2017 and the largest for the date since 2007. China has decided to raise tariffs on U.S. pork imports. These factors should temper seasonal price gains for pork this spring.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Decreasing	Ample	Lower
Sow	Decreasing	Ample	Lower
Belly (bacon)	Increasing	Good	Lower
Sparerib(4.25 lb & down)	Decreasing	Good	Higher
Ham (20-23 lb)	Increasing	Good	Higher
Ham (23-27 lb)	Increasing	Good	Lower
Loin (bone in)	Decreasing	Good	Lower
Babyback Rib (1.75 lb & up)	Decreasing	Good	Lower
Tenderloin (1.25 lb)	Decreasing	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	Lower
72% Trimmings	Increasing	Good	Lower



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Poultry

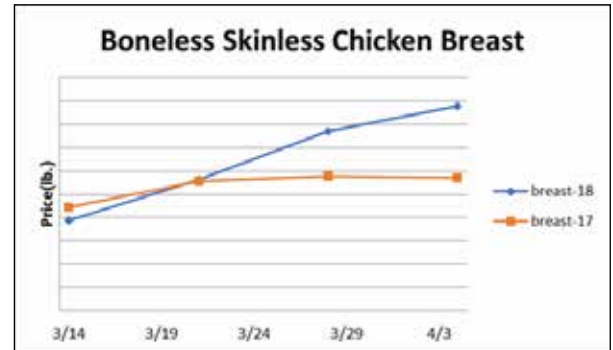
Chicken output for the week ending March 24th fell 2.1% from the prior week but was up .6% from the same week in 2017. The six-week moving average for chicken production was 1.4% larger than last year. Recently rising corn and soybean meal prices could temper chicken output growth later this year. Spot feed costs last week were the most expensive since July 2016. If this persists, it may negatively impact chicken producer margins. The ARA Chicken Breast Index recently rose to its highest level since July. Conversely, the ARA Chicken Wing Index is at its lowest level for this time of the year since 2014. History says that lower wing prices can still materialize. The ARA Chicken Wing Index typically falls 5.5% during the next five weeks.

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	Higher
Breast, Bnless Skinless SE	Increasing	Good	Higher
Breast Boneless Index (ARA)	Increasing	Good	Higher
Tenderloin Index (ARA)	Decreasing	Good	Lower
Legs (whole)	Decreasing	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)	Steady	Good	Lower
Turkey Breast, Bnls/Sknls	Increasing	Good	Higher

Eggs

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



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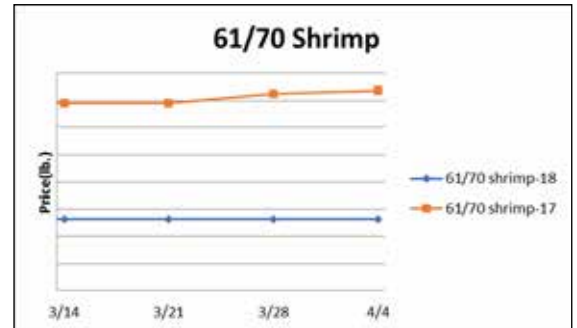
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Seafood

The main Canadian snow crab fishing season is just around the corner. Canadian snow crab population assessments in recent months suggest that the lower quotas are causing some modest recovery. However, an historically low Newfoundland quota is anticipated this year. This factor could underpin snow crab leg prices for the next several months.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Steady	Good	Higher
Shrimp (61/70 frz)	Steady	Good	Lower
Shrimp Tiger (26/30 frz)	Steady	Good	Higher
Snow Crab, frz	Steady	Good	Lower
Tilapia Filet, frz	Steady	Good	Lower
Cod Filet, frz	Steady	Good	Higher
Tuna Yellowfin, frsh	Steady	Good	Higher
Salmon Atlantic Filet, frsh	Steady	Good	Lower
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.	Increasing	Good	Lower
PP-HIGP-heavy grade utensils	Decreasing	Good	Lower
PE-LLD-can liners, film, bags	Steady	Good	Lower

Retail Price Change from Prior Month

Description	Feb-18	Jan-18	Dec-17
Beef and Veal	Increasing	Decreasing	Increasing
Dairy	Decreasing	Decreasing	Decreasing
Pork	Decreasing	Increasing	Decreasing
Chicken	Increasing	Decreasing	Decreasing
Fresh Fish and Seafood	Increasing	Decreasing	Increasing
Fresh Fruits and Vegetables	Decreasing	Increasing	Decreasing

Various Markets

The coffee market continues to trade at engaging levels for buyers. Large supplies from Brazil and an enduring low value from the Brazilian real have kept a lid on prices. History suggests, however, that the greater long-term risk for the coffee market 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	Same
Coffee lb ICE	Decreasing	Good	Lower
Sugar lb ICE	Increasing	Ample	Lower
Cocoa mt ICE	Decreasing	Short	Higher
Orange Juice lb ICE	Increasing	Good	Lower
Honey (clover) lb	Steady	Good	Higher



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Produce

Market Overview

Most growers have started transitioning to Salinas, and we should see a complete transition by next week. There is heavy rain forecasted and we will more than likely see quality issues from these adverse weather conditions. Berries are improving and most commodities are steady.

Watch List

Apples & Pears

New crop now available we are seeing the pressure on the market decrease and shortages diminish. Excellent quality available on all varieties; however, we are seeing less production of Golden Delicious as the trees are being pulled and replaced with more favorable varieties. Quality is very good: sugar levels range from 14 to 18 Brix. Pears: Bosc, Bartlett and D'Anjou are available out of Yakima and Wenatchee Districts.

Artichokes

We are seeing much higher prices and poor quality.

Arugula

Product is tightening up and quality is fair.

Asparagus

ESCALATED Production from Mexico is slowing down and Peru doesn't have enough volume to cover the demand. Lack of supplies is driving prices up. We are also seeing a shortage in supply on larger sizes. We do not expect to see product improve for some time.

Avocados

ESCALATED Sizes in escalation include: 48 #1 and #2, 60 and 70 #1's. Weekly volumes are expected to dip slightly due to Holy Week in Mexico, while harvest levels increase in California. Premium grade fruit has become short and remains heavy on grade 2 and small fruit. In California, volumes are expected to increase this month; however, heavy rain last week and the predicted forecast calling for additional rain this week will limit local harvesting.

Bananas

Demand on this item remains firm; however, prices will continue to ease. Quality will remain inconsistent due to weather that has impacted the growing regions in Guatemala, Mexico, and Costa Rica. This only further complicates an already short banana market across the country due to virus impacts. Due to improving inventories, we should no longer see ripening issues.

MARKET ALERT

- **Asparagus – ESCALATED**
- **Avocado – ESCALATED**
- **Limes – ESCALATED**
- **Mushrooms – ESCALATED**



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Produce (continued)

Beans

EAST: South FL & the lake area are still producing good volume. There was some recent windy weather in the fields which could show wind scar in the upcoming harvest. Other than this, FOBs are steady and quality is overall good.

WEST: Culiacan is wrapping up with Guasave still harvesting. FOBs expected to remain steady for another 7-10 days. After that, we could see things turn around and move upwards as growers wrap up. Quality is good.

Berries:

Blackberries

The market is stable. Mexican supplies 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

High prices persist; rainy weather and low temperatures have limited stocks in the primary growing areas of Oxnard, California and Mexico. Quality is average: chill damage and shriveling are industry-wide issues.

Raspberries

The market is unchanged. California supplies are tight. Mexico is the main production region at this time of year. Quality is very good: color is deep red and flavor is tangy, yet sweet. Sugar levels vary from 13 to 14 Brix.

Strawberries

Prices are steady at high levels. California strawberry supplies are increasing; warmer weather has promoted growth. More rain is expected by the weekend; supplies will tighten again. Seasonal harvesting in Florida and Mexico (into South Texas) is over.

Bok Choy

Quality is average and we are seeing some higher quotes on WGA cartons.

Broccoli / Broccoli Florets

Prices are low. Growers have transitioned from the Yuma, Arizona growing area to California's Salinas Valley. California quality is best: aphids and brown beading are minor problems.

Brussels Sprouts

Supplies are light and quality is average.

Cantaloupe

Market has strengthened a bit here on the west coast and east coast seems to be steady as demand has been good. The offshore fruit quality has been nice with a firm green to cream to cast and good internal color and tight cavity, sugars are good. We expect to see the market keep steady and strengthen going forward until we start the Imperial Valley and Mexico around the first week of May and possibly sooner as the Weather has been unseasonably warmer than normal. The vines are really maturing faster than normal in the desert, which looks to be about 7-10 days earlier than last year.

Carrots

We are seeing both good quality and volume.

Cauliflower

Supplies are normal. We are seeing steady prices and good quality.

Celery

This market is steady, both quality and price are good.

Cilantro

Supplies are very light and quality is fair due to the colder weather.



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Produce (continued)

Corn

This market has firmed up due to the cooler weather. We anticipate improved volume over the next week.

Cucumbers

EAST: The last of the Honduras off shore fruit should be hitting ports this week. Quality has been poor. Our Florida crop continues to push out good numbers and quality is very nice. WEST: Sonora & Sinaloa are producing solid numbers while Baja is getting into the mix, keeping pressure on FOBs to stay low. Quality is overall very good, but could vary by grower.

English Cucumber

There are excellent supplies crossing through Nogales and McAllen.

Eggplant

EAST: Great supply is readily available. Prices remain low and quality is great.
WEST: Great supply is readily available. Prices remain low and quality is great.

Fennel

Supplies for the week will be good and quality is good.

Garlic

EXTREME: We are about 50% done with the 2017 crop. Supplies will remain tight between now and July. Prices remain high.



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 a bit stronger we are seeing Crimsons, Perlones, Timcos and Alison's on red varieties that have good stretch and good size to them and eating good as well on both coasts. The Market has strengthened and we will see it continue to stay strong as we move closer to finishing the Chilean fruit which will take us through the first of May and we should have a smooth transition to Mexican and Coachella Valley fruit which should start by the first of May. The green grapes will continue to be a struggle as quality is fair, and the larger fruit is really strengthening and will continue to do so, as there were some rains in Chile that did cause some damage especially on the greens. Our feeling is that we will probably have a gap on greens between Mexico and Coachella.

Green Cabbage

Supplies have improved in the southeast as well as in the West. FOB calls are down and quality remains very nice.

Red Cabbage

Quality has been hit and miss while sizing remains good. We are seeing some external quality and color issues causing markets to remain firm in the East as well as Texas. West Coast volume is improving.

Green Onions

Market is steady with good quality and supplies.

Honeydew

Market steady with good demand across the board on all sizes, they are on the tight side. The overall quality has been very nice with a nice green to cream exterior and very good sugar and a tight cavity. As we mentioned above for the Cantaloupes, the Honeydew will be on the same path in the desert starting earlier than normal out of Mexico and Imperial Valley.

JICAMA

Quality and supplies are fair.

Kale (Green)

Quality and supplies are fair.

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Produce (continued)

Kiwi

California supplies are very limited; lighter supplies are also expected on Italian fruit coming through the East Coast. Markets continue to firm up.

Lemons

Market is steady and strengthening as we are harvesting Dist. 1 and 2 with a majority of the volume coming from Dist. 1, the fruit from Dist. 1 is on the larger side keeping the smaller sizes a bit tighter and with these rains we are experiencing we will see the fruit continue to size up. The Dist 2 fruit does have some smaller fruit but we are size picking getting the larger fruit off the tree. The overall quality is good with some good color and excellent juice content. We are expecting to finish here in Dist. 1 around the first of May and then we will dependent upon Dist. 2 fruit until the Chilean fruit starts to arrive around mid-June. We will also start some Mexican fruit around the end of July, so hopefully we have a good summer with no gaps and quality stays good.

Lettuce:

Butter

Supplies are normal and quality is average.

Green and Red Leaf

Quality is good; however, there is some blistering and peel.

Iceberg Lettuce

Quality is average and the market is steady.

Romaine

Quality and prices are average. Supply is normal.

Romaine Hearts

Supplies are normal, quality is good, and prices are average.

Limes

Prices have eased; post-Easter supplies are increasing. Small sizes dominate the crop. Quality is very good.

Napa

Supplies and prices are steady. Quality is good.

Idaho/Oregon Onions

Looks like we are in the final two weeks before shippers wrap up our 2017/2018 season. Quality is still holding well on our storage onions with few issues to report. Texas has started on domestic reds and there should be a few sheds starting on their own yellows next week sometime.

Oranges

Market strong especially on the 88's and smaller demand exceeds on 113's and 138's which will continue as we have been saying this crop is about 40% lighter than normal and will finish up much sooner than the past few years probably around the first week of May, and the fruit is on the larger side. With these recent rains the fruit will continue to size up which just puts more pressure on the smaller fruit, also if we get some warmer weather we will see more fruit drop as well which will cause more of a shortage. We will start some Valencia's in about 3-weeks which will help on the smaller fruit but it is also a lighter crop so we will be fighting on smaller fruit through the year until we start navels around the first of November. The overall quality of the navels is good with excellent sugar and beautiful color, we are seeing some internal separation and puff and crease which is pretty normal for this time of the year.

Parsley(Curly, Italian)

(Curly, Italian) Quality and supplies are fair.

Green Bell Pepper

EAST: The spring crop is starting to come on in FL with better supply available. Things are starting to gently unravel. Despite this, the #1 grade big fruit is still tighter than choice & smalls. FOBs are steady but feeling some downward pressures. Quality overall is good, but some color trouble is being reported from the fields.

WEST: MX spring crops are still about 14 days out. Old crop is showing signs of age with thinner walls and bruising. Coachella has just scratched the surface with better yields on the horizon. Thus, FOBs are starting to taper off but only slightly.



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Produce (continued)

Jalapeno Pepper

EAST: South FL is still producing a low but steady volume of peppers. Prices are mostly stable with good quality available. WEST: Good supply continues to come from Sinaloa and Sonora, with Sinaloa showing better signs of quality. All sizes and heat levels are readily available. Quality and sizing is excellent.

Red and Yellow Bell Pepper

Prices are level; stocks are average. Quality is very good: discoloration, odd shape, and scarring are occasional problems.

Pineapple

The market is level; small sizes are limited. Quality is average: sugar levels are high, ranging from 13 to 16 Brix.

Idaho Potatoes

There has been an uptick in demand that is pushing fob prices up for the first week of April. We can also attribute some of this strength to fewer Norkotahs offerings. The middle size cartons continue to be the most active, while a more moderate increase was seen on 40's and 50's. Most shippers pricing on 100ct and #2 grades are unchanged.

Radishes

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

Salad Blends

Although prices are stable, raw product supplies are tighter due to industry-wide defects caused by fluctuating temperatures. Quality is average: growers must harvest more fields to meet volume requirements; epidermal blistering and peeling are reducing head weights.

Snow and Sugar Snap Peas

Snow and sugar snap peas supplies are steady through Miami.

Spinach (Bunched)

Supplies are available and quality is fair due rain.

Spinach (Baby)

Baby and clipped spinach supplies are good, but showing some quality issues due to rain.

Spring Mix

Supplies are available and quality is fair due to weather.

Yellow Squash / Zucchini

EAST: Excellent supply is coming from both central and south Florida keeping FOBs low. Quality has been a hot topic the last few months. While quality isn't perfect yet, it is improving, especially from central FL.

WEST: Hermosillo is producing a steady and solid supply. However, yellow supply is lightening up just a hair which is resulting in FOBs trying to move upward a few dollars. Quality overall is great. There is still split market pricing on #1 vs #2 quality.

TOMATOES-EAST

Rounds

Spring has sprung! There are excellent supplies coming to market from our South Florida farms. Bigger fruit is in heavier supply, however, there is still ample available on all sizes. Look for Palmetto/Ruskin to begin in about 2 weeks. FOBs are down a good amount on all sizes to match the good supplies from the farms. Quality is excellent.



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Produce (continued)

Romas

Although actual supply is light to moderate, with steady demand, there is still good supply available. FOBs are down again to mirror up with the light demand and spring crop. Quality has been exceptionally nice recently.

Grapes

Good supply is still available from Florida farms. Although last week there was a slight flush of product, volumes are expected to stay steady for the next few weeks. Quality is excellent.

Cherries

Good steady supplies is putting some downward pressures on supply. Look for good supply through April. Quality is crisp and excellent.

TOMATOES-WEST/MEXICO

Rounds

Good and steady volumes from Jalisco & Sonora are expected to continue to cross through April. This is keeping FOBs steady week over week in the west. Quality overall is great, however there have been some reports of quality issues from the open field product.

Romas

Solid supply from Mainland MX & Baja (just beginning) is expected to continue throughout the month. FOBs are steady moving into next week. Quality is excellent.

Grapes

Good supply is still coming from MX, however, things will start to dwindle down in the next few weeks. Fields will transition to Baja in late April/early May. Current FOBs are still low with not much change and quality is excellent. Note there are still some "deals" out there for subpar quality. Beware of the "deal" as better quality is demanding a higher price point.

Cherries

Although MX is still in production, quality remains poor. Thus, demand is shifting towards the Florida crop even though freight costs are a bit higher.

Watermelons

The market is steady; stocks are plentiful in both areas. Quality will continue to improve as Mexican growers transition to northern harvesting regions. Sugar levels are increasing.

