



MARKET TRENDS

FOR WEEK ENDING APRIL 20, 2018

 **PERFORMANCE**
FOODSERVICE



MARKET TRENDS

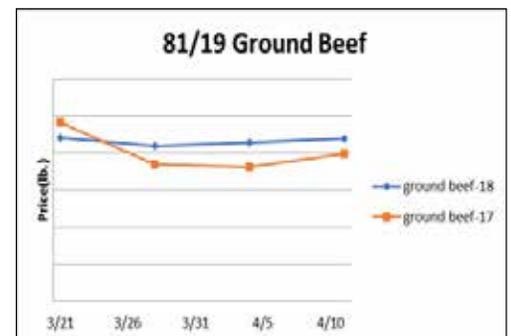
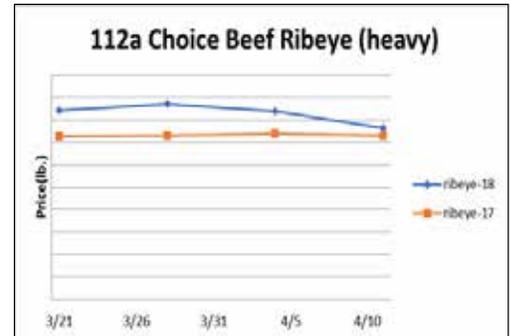
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Beef, Veal & Lamb

Beef output last week increased 3.2% and was a whopping 8.8% larger than the same week last year. Cattle slaughter was the strongest since mid-December. Slaughter ready cattle numbers are anticipated to be big in the coming months which should encourage strong year-over-year gains in beef production. Beef demand has risen and there is indication that retailers will feature steak cuts in the coming weeks. Forward pricing on ribeyes and tenderloins are at a 10% and 11% premium over the spot markets. This should provide modest support the beef middle meat markets in the coming weeks. February beef imports were up 9% from 2017 which may temper lean beef trim seasonal price gains this spring.

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	Decreasing	Good	Higher
109 Export Rib (ch)	Decreasing	Good	Lower
109 Export Rib (pr)	Decreasing	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)	Decreasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Higher
116b Chuck Tender (ch)	Increasing	Good	Lower
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)	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)	Decreasing	Good	Lower
180 0x1 Strip (ch)	Decreasing	Good	Lower
180 0x1 Strip (pr)	Decreasing	Good	Lower
184 Top Butt, boneless (ch)	Decreasing	Good	Lower
184 Top Butt, boneless (pr)	Increasing	Good	Lower
184-3 Top Butt, bnls (ch)	Decreasing	Good	Lower
185a Sirloin Flap (ch)	Decreasing	Good	Higher
185c Loin, Tri-Tip (ch)	Decreasing	Good	Lower
189a Tender (sel, 5 lb & up)	Decreasing	Good	Lower
189a Tender (ch, 5 lb & up)	Decreasing	Good	Lower
189a Tender (pr, heavy)	Decreasing	Good	Lower
193 Flank Steak (ch)	Decreasing	Good	Higher
50% Trimmings	Increasing	Good	Lower
65% Trimmings	Increasing	Good	Higher
75% Trimmings	Decreasing	Good	Higher
85% Trimmings	Decreasing	Short	Lower
90% Trimmings	Decreasing	Short	Higher
90% Imported Beef (frz)	Decreasing	Good	Lower
95% Imported Beef (frz)	Decreasing	Good	Lower
Veal Rack (Hotel 7 rib)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Higher



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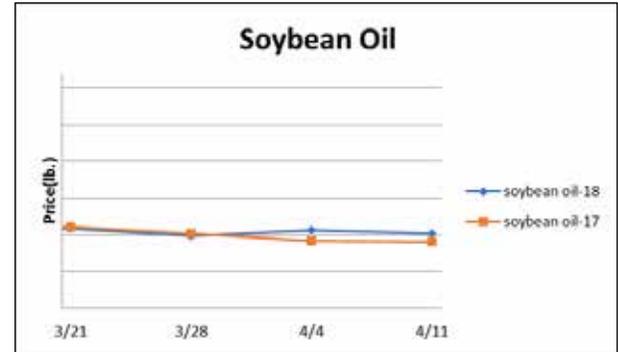
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Grains

The cold, wet spring in the Midwest has delayed the 2018-19 planting season. Just 2% of corn and spring wheat had been sowed as of April 8th which is behind historical levels. Concerns are building that less corn, soybean, and spring wheat acreage could be harvested this year which would be supportive of the markets.

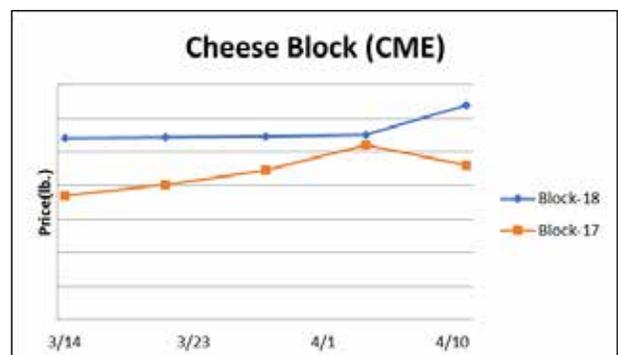
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Higher
Crude Soybean Oil, lb	Decreasing	Good	Higher
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Steady	Good	Higher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



Dairy

The butter market is firming due in a large part to rising world butter prices. This is fueling export interest. U.S. butter exports during February were 19.8% greater than the previous year, while imports were down 2.5%. Domestic butter output was 4.7% better than 2017 which caused the available supply to be 2.3% bigger. Butter prices could remain firm in the near term until the international markets turn downward. U.S. cheese exports in February were up 6.4% from a year ago and the biggest for the month since 2015. Export demand may underpin cheese prices this fall.

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



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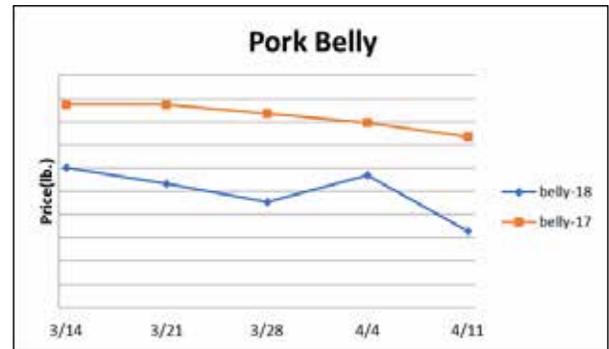
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Pork

Pork production last week fell 2.4% but was 1.3% better than the same week a year ago. Hog slaughter is expected to seasonally decline over the next few weeks. Still, solid year-over-year gains in pork output are forecasted during the next several months. The USDA pork cutout index recently priced at its lowest level for this time since 2015. Yet, solid export demand could support pork prices this spring. February U.S. pork exports were 8.4% better than the prior year and a record. Exports to China were up 11.1% and the best for the month since 2014.

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



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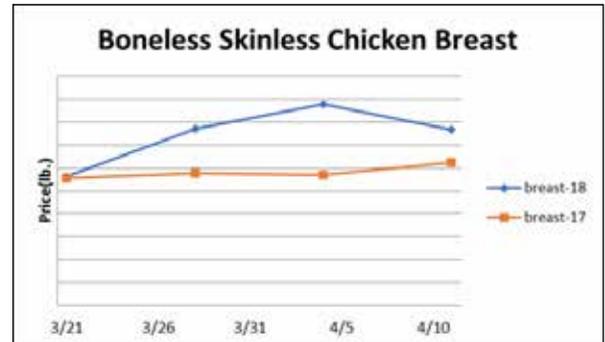


Poultry

Chicken production for the week ending March 31st rose .8% from the prior week and was up .2% from the same week in 2017. The six-week moving average for chicken output is just .9% more than last year. This is due in a large part to disappointing hatchery rates from broiler layers. Chicken producer margins have weakened which could temper year-over-year output expansion later this summer.

Recently, the chicken tender price premium over chicken breasts was the smallest since December 2015. The chicken wing price premium over breasts was the tightest since October 2014. These price spreads hint that the rising chicken breast markets may take a pause. And, that the downside risk for chicken wings could be limited

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



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



Eggs

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

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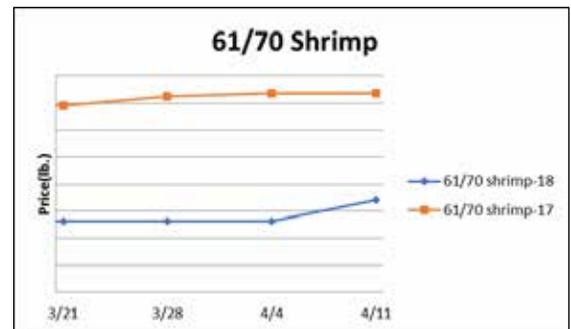
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Seafood

Salmon prices continue to generally track below the previous year levels. During February, the average Atlantic salmon import price was 12.8% less expensive than 2017. Total U.S. salmon imports during the month were bigger by 13.7%, while trade from Canada was up by 18.9%. Salmon prices could generally remain below the prior year levels this spring.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Decreasing	Good	Lower
Shrimp (61/70 frz)	Decreasing	Good	Lower
Shrimp Tiger (26/30 frz)	Decreasing	Good	Lower
Snow Crab, frz	Decreasing	Good	Lower
Tilapia Filet, frz	Increasing	Good	Lower
Cod Filet, frz	Increasing	Good	Higher
Tuna Yellowfin, frsh	Increasing	Good	Higher
Salmon Atlantic Filet, frsh	Increasing	Good	Lower
Pollock Filet, Alaska, frz	Increasing	Good	Lower



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Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
WOOD PULP (PAPER)			
NBSK- Paper napkin	Decreasing	Good	Higher
42 lb. Linerboard-corrugated box	Decreasing	Good	Higher
PLASTIC RESINS (PLASTIC, FOAM)			
PS-CHH-utensils, cups, to-go cont.	Steady	Good	Lower
PP-HIGP-heavy grade utensils	Steady	Good	Lower
PE-LLD-can liners, film, bags	Steady	Good	Lower

Retail Price Change from Prior Month

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

Various Markets

The sugar markets continue to track below year ago levels. Sugar supplies abroad, particularly in Brazil and India, are at least adequate for demand. This, and a deflated value of the Brazilian Real, is weighing on sugar prices. However, the greater risk in prices is to the upside.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Decreasing	Good	Higher
Tomato Paste-Industrial (lb)	Decreasing	Good	Lower
Coffee lb ICE	Increasing	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	Higher



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Produce

Market Overview

Most growers have transitioned to Salinas. We expect a full transition within the next few days. Most commodities are steady. Due to the rain and colder weather, we are seeing slower growth rates on romaine. We are also seeing open full leaves and very green color. Strawberries have improved.

Watch List

Apples & Pears

The market is steady; large Granny Smith supplies are tight, but all other varieties are ample. Quality is very good: sugar levels range from 14 to 18 Brix.

The Washington Pear market is level. Sugar levels range from 12 to 14 Brix. The Bosc season will wind down in late April.

Artichokes

We are seeing improvement in this market. Quality is better.

Arugula

Average supplies and quality is fair.

Asparagus

Prices are starting to inch down; spring volume is rising. Quality is best in Mexico where spears are straight and flavor is pleasantly grassy.

Avocados

The market is stable. Mexican stocks are sufficient, but the new crop California season is just getting started. Quality is very good: oil content is high, creating creamy texture and subtly nutty flavor.

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.

Beans

EAST: Good volume continues to come from the Lake Area and Homestead keeping FOBs low. However, the pressure to move up is starting to be felt as the seasons are expected to close in the next 2-3 weeks. Current quality is very nice.

WEST: There are still some beans coming from Guasave, however, the season will soon be moving north to the Desert. FOBs are steady into next week as the good growing conditions are expected to make this a smooth transition.

MARKET ALERT

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



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Produce *(continued)*

Berries:

Blackberries

Prices are level. Although California stocks remain tight, Mexican volume is starting to increase due to warmer weather. Quality is very good: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is starting to inch down; supplies have increased in Oxnard, California and Central Mexico. Quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

Prices have escalated. Rain has tightened California stocks, while warm weather has limited supplies in Mexico. There may be a harvesting gap over the next several weeks. Quality has also diminished. Sugar levels vary from 13 to 14 Brix.

Strawberries

The market is starting to inch down despite last week's rain storms. California volume is beginning to climb; supplies will increase as weather warms in Oxnard, Santa Maria, and Watsonville, California.

Bok Choy

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

Broccoli

The market is near the bottom; stocks are ample in both growing regions. New crop California quality is best: aphid and worm pressure, as well as brown beading, are slight issues in Mexico.

Brussels Sprouts

Supplies are light and quality is average. Prices are higher.

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. 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 average and quality is fair due to the colder weather.

Corn

This market has improved and quality looks good on yellow and bi-color. We anticipate improved volume over the next week.

Cucumbers

EAST: Florida is expected to increase supply over the next 2-3 weeks now that the offshore deal is done. Until this increase is done, supply is still a little tight putting some upward pressure on FOBs. Quality overall is very nice.

WEST: Great supply is readily available. Prices are steady and quality is good. The desert should start in about 10-14 days.



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Produce (continued)

English Cucumber

There are excellent supplies crossing through Nogales and McAllen.

Eggplant

EAST: Great supply is readily available. Prices remain low and quality is mostly good (some reports of wind scar present).
WEST: Great supply is readily available. Prices are steady and quality is good. The desert should start in about 10-14 days.

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

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 good on both coasts.

Kiwi

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



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Produce (continued)

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 in the red leaf.

Iceberg Lettuce

Quality is good and the market is steady.

Romaine

Quality and prices are average. Supply is shorter than normal. Color is very green.

Romaine Hearts

Supplies are slightly below average, quality is good, and prices are average.

Limes

The market for large sizes is high; prices for small sizes are easing. Quality is good; blanching (discoloration) is a cosmetic issue only.

Napa

Supplies and prices are steady. Quality is good.

Onions

The market is mostly unchanged; supplies are adequate. Red and Yellow Onions from the Northwest will be available through early May. Fresh-run onions from Mexico and Texas are now on the market. Both crops are dominated by medium and jumbo sizes. California yellow onions will be available next week, followed by red supplies the week after.

Oranges

Market very strong across the board demand exceeds supply 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 next week 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)

Quality and supplies are fair.

Green Bell Pepper

EAST: Much better supply is available this week from FL. #1 big peppers are still a hair snug, but more readily available. FOBs are moving downward with deals still available on choice and smalls. Quality is improving from prior weeks. WEST: Because of the good weather, MX & CA have both started tapping into their spring crops with good volume available. FOBs are starting to fall with deals on the choice and small grades. Overall quality has been good, however there are some reports of thin walls and misshaped pepper.



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Produce *(continued)*

Jalapeno Pepper

EAST: South FL is still struggling to give any major volume away. Plant City is expected to start in about 3 weeks, but until then it will be a day to day deal. Prices are up with good quality available.

WEST: Chiles are in a transitional period for the next 10-14 days until new crop begins. There are reports of light shrivel and discoloration coming from most of the older fields. FOBs are up.

Red and Yellow Bell Pepper

The market is beginning to inch down; supplies are increasing. Quality is very good: skins are smooth and flavor is subtly sweet.

Pineapple

Prices are up; stocks are limited, especially small sizes. Quality is good: sugar levels are high, ranging from 13 to 16 Brix.

Idaho Potatoes

The market is climbing, and will continue to gradually climb as the storage season progresses, especially for large sizes. Storage crop Norkotah Potatoes will be depleted by the week of April 23. Idaho Burbank Potatoes are readily available.

Radishes

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

Salad Blends

The market is steady; all supplies will be harvested and processed in Salinas by next week. Quality is good: tip burn is a minor issue, but inspectors are selecting the best fields for production.

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

The market is unchanged. After this week, all harvesting will be fully transitioned to the Salinas Valley. Quality is good: insect pressure and fringe burn are being reported in green tango (due to strong winds and warm weather).

Yellow Squash / Zucchini

EAST: Homestead, South Florida & Plant City are all working through their crop. FOBs are pushing upward as quality becomes yet again a hot topic for yellow. Scarring and bruising is the biggest concern. Zucchini is still in good condition with steady FOBs.

WEST: Hermosillo is producing a steady and solid supply. Quality overall is great. There is still split market pricing on #1 vs #2 quality.



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Produce *(continued)*

TOMATOES-EAST

Rounds

Excellent supplies are harvesting from our South Florida farms. Needless to say, tomatoes are plentiful this week. Extra-large sizes are most readily available as most growers work through their crown picks. FOBs are down 50 cents to a dollar for next week. With beautiful weather in the forecast, a great spring crop is expected to continue for the next 4-6 weeks. Ruskin/Palmetto will add to the mix in about 10-14 days. Quality is excellent.

Romas

Steady spring volumes are coming from South Florida under the superb growing conditions. Extra-large & large sizes are most readily available as most growers work through their crown picks. With beautiful weather in the forecast, a great spring crop is expected to continue for the next 4-6 weeks. Ruskin/Palmetto will add to the mix in about 10-14 days. Quality is excellent.

Grapes

Bountiful supplies are available from South Florida as grape production continues to ramp up. Palmetto/Ruskin will join the mix in 10-14 days. Good supply is expected for the next 4-6 weeks. FOBs have shifted downward a little. Quality is excellent.

Cherries

Solid volume from the fields is putting further downward pressures on FOBs. Look for good supply for the next 4 weeks with FOBs expected to remain low through this timeframe. Quality is crisp and excellent.

TOMATOES-WEST/MEXICO

Rounds

Steady spring supplies are coming from Jalisco & Sonora. Production is expected to remain solid for the next 4-6 weeks, keeping FOBs hovering around the minimum. Quality overall is excellent, however there have been a few minor reports of quality issues from the open field product.

Romas

Western & Mainland MX are bringing steady numbers to the market while Baja continues to increase their numbers. Great supply is expected to last through May (weather permitting!). FOBs are still hovering at or around the minimum. Quality is excellent.

Grapes

Typically this is the time of year the west starts their transition. However, with great growing conditions, growers are confident they may get through the season without any gapping. FOBs are hovering at or around the minimum. Quality remains excellent.

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

Prices have eased; supplies are abundant. Quality is good; sugar levels are increasing.

