



MARKET TRENDS

FOR WEEK ENDING MAY 11, 2018

 **PERFORMANCE**
FOODSERVICE



MARKET TRENDS

MAY 11, 2018

PERFORMANCE
FOODSERVICE

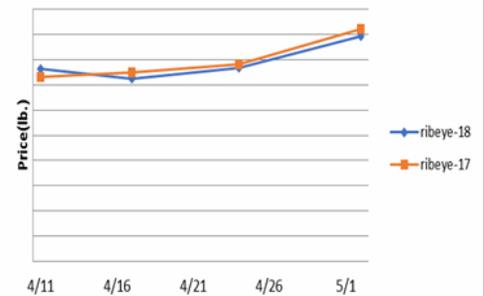


Beef, Veal & Lamb

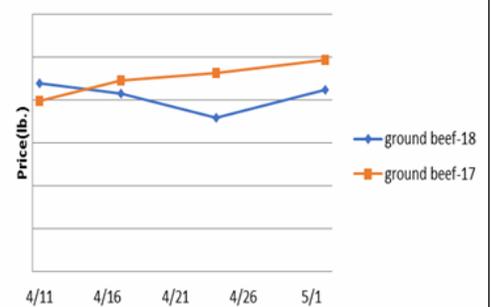
Beef output last week fell .5% but was .8% larger than the same week last year. Year-to-date cattle slaughter was 2.1% better than 2017. Beef production in the coming months is forecasted to be much stronger than a year ago. Beef prices have begun to seasonally rise as retailers aggressively feature beef, especially grinds. Total wholesale beef sales over the last four weeks were 10.1% more than last year. However, boneless beef stocks on March 31st were .9% larger than 2017, the best build for the month in five years. This factor, along with strong beef output and heavier cattle weights, may temper the upcoming seasonal rally for the ground beef markets in the coming weeks.

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	Increasing	Good	Lower
Ground Chuck	Increasing	Good	Higher
109 Export Rib (ch)	Increasing	Good	Lower
109 Export Rib (pr)	Decreasing	Good	Lower
112a Ribeye (ch)	Increasing	Good	Lower
112a Ribeye (pr)	Increasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Increasing	Good	Higher
116 Chuck (sel)	Decreasing	Good	Higher
116 Chuck (ch)	Increasing	Good	Higher
116b Chuck Tender (ch)	Increasing	Good	Lower
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Decreasing	Good	Higher
121c Outside Skirt (ch/sel)	Decreasing	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)	Increasing	Good	Higher
169 Top Round (ch)	Decreasing	Good	Lower
171b Outside Round (ch)	Increasing	Good	Lower
174 Short Loin (ch 0x1)	Increasing	Good	Lower
174 Short Loin (pr 2x3)	Increasing	Good	Lower
180 0x1 Strip (ch)	Increasing	Good	Higher
180 0x1 Strip (pr)	Increasing	Good	Lower
184 Top Butt, boneless (ch)	Increasing	Good	Lower
184 Top Butt, boneless (pr)	Increasing	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Lower
185c Loin, Tri-Tip (ch)	Increasing	Good	Lower
189a Tender (sel, 5 lb & up)	Increasing	Good	Lower
189a Tender (ch, 5 lb & up)	Increasing	Good	Lower
189a Tender (pr, heavy)	Increasing	Good	Lower
193 Flank Steak (ch)	Increasing	Good	Higher
50% Trimmings	Increasing	Good	Lower
65% Trimmings	Decreasing	Good	Higher
75% Trimmings	Decreasing	Good	Higher
85% Trimmings	Decreasing	Short	Lower
90% Trimmings	Decreasing	Short	Lower
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

112a Choice Beef Ribeye (heavy)



81/19 Ground Beef



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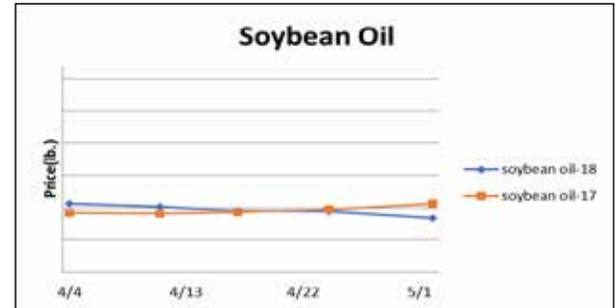
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Grains

The spring wheat planting season remains behind with just 10% in the ground as of April 29th. This compares to the five-year average for the date of 36%. Planting is anticipated to pick up substantially in the coming weeks, but some acreage could be switched to soybeans. Wheat prices are overdue for a short-term correction lower.

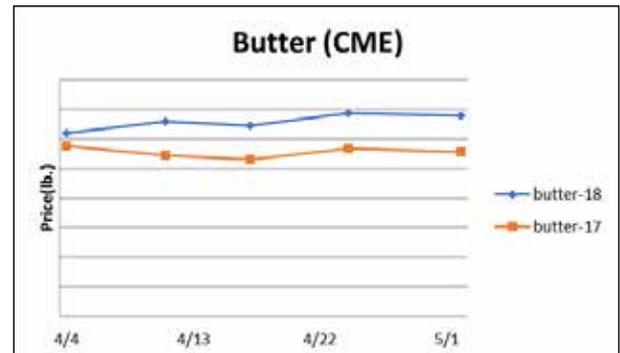
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Higher
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher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



Dairy

The butter market remains firm due in a large part to solid export demand. March 31st butter stocks were slightly larger than the previous year and the biggest for the date since 1993. Further, European milk output should seasonally expand which may also temper export demand for U.S. butter. These factors suggest that the upside in the butter markets may only be modest from here. March 31st cheese stocks were 5.2% greater than the previous year and a record for the date. However, the cheese inventory build from January through March was the second smallest since 2012.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Higher
Cheese Blocks (CME)	Increasing	Good	Higher
American Cheese	Increasing	Good	Higher
Cheddar Cheese (40 lb)	Steady	Good	Higher
Mozzarella Cheese	Steady	Good	Higher
Provolone Cheese	Steady	Good	Same
Parmesan Cheese	Steady	Good	Higher
Butter (CME)	Decreasing	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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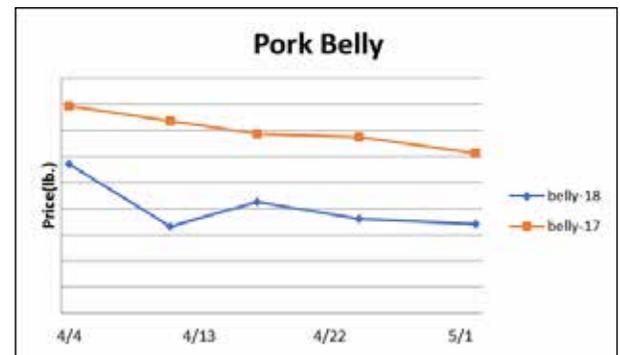
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Pork

Pork production last week decreased 3% but was 3.7% bigger than the same week a year ago. Hog slaughter was the lowest in three weeks. Notable year-over-year pork output gains are anticipated to persist in the coming months. March 31st pork stocks were 12% more than 2017 with belly (188%), picnic (29%), ham (7%), loin (9%), and trim (41%) holdings all above the prior year. This factor, and big pork output gains, makes the various pork markets susceptible to only a modest upward seasonal move into the summer, despite solid exports.

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



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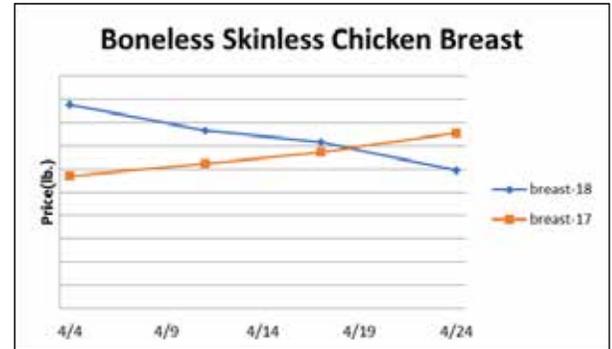
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Poultry

Chicken output for the week ending April 21st fell .2% from the prior week and was 2.9% more than the same week last year. The six-week total of chicken production was up 1% from 2017. Chicken producer spot margins last week were the worst for the week in four years due in part to rising corn and soybean meal prices. If this trend persists, it could slow expected year-over-year output gains later this year. March 31st chicken stocks were 14% larger than 2017 with breast (5.4%), leg quarter (23.3%), thigh (11.9%), and wing (5.3%) holdings all above the prior year. It was the first time in 13 months that wings had a year-over-year increase. Since 2013, the average move for the ARA chicken breast index during the next three weeks was up 7.5%.

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	Decreasing	Good	Lower
Breast, Bnless Skinless SE	Increasing	Good	Lower
Breast Boneless Index (ARA)	Decreasing	Good	Lower
Tenderloin Index (ARA)	Increasing	Good	Lower
Legs (whole)	Decreasing	Good	Higher
Leg Quarter Index (ARA)	Decreasing	Good	Higher
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	Decreasing	Good	Higher

Eggs

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



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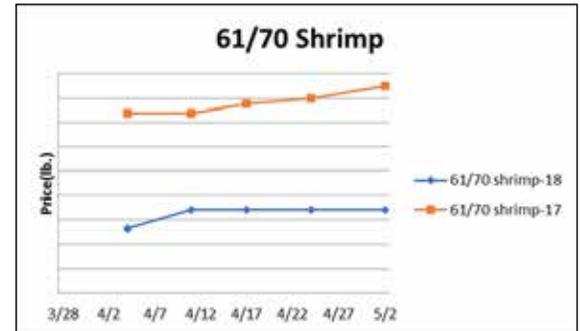
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Seafood

The snow crab leg markets remain historically inflated. World supplies are limited due to the smaller Canadian and Alaskan harvests and not expected to greatly improve in 2018. This year's Newfoundland (17%) and Gulf of St. Lawrence (44%) snow crab quotas are both substantially below 2017 and multi-year lows. This should underpin snow crab prices.

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	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.	Steady	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	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

International sugar prices have found some modest support as of late. Higher crude oil prices are driving better sugar demand for ethanol in Brazil. This may underpin the sugar markets at least in the near term. But, ample world supplies should eventually temper that upside potential for sugar.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Steady	Good	Higher
Tomato Paste-Industrial (lb)	Steady	Good	Lower
Coffee lb ICE	Increasing	Good	Lower
Sugar lb ICE	Decreasing	Ample	Lower
Cocoa mt ICE	Increasing	Short	Higher
Orange Juice lb ICE	Increasing	Good	Lower
Honey (clover) lb	Steady	Good	Higher



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Produce

Market Overview

Most commodities are steady this week and showing better quality. Oranges have hit an EXTREME market with higher prices and shortages in supply as well as lemons. Mother's Day is fast approaching which means asparagus and berries may remain slightly active until after the holiday. Green leaf and avocados are escalated. NOTE: Spring Market freight rates have taken a drastic increase over the last week and have continued to increase. Although the FOB markets may read as steady, or only slightly changed, note that inbound freight rates have increased significantly.

Apples & Pears

Prices are level. Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are available; large Granny Smith volume is low, but all other varieties are abundant. Quality is very good: sugar levels range from 14 to 18 Brix.

Pear prices are stable. Washington D'Anjou Pears are on the market. Red D'Anjous are also available. New crop California Bartletts will enter the market in late June. Sugar levels range from 12 to 14 Brix.

Artichokes

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

Arugula

Quality has improved, and supplies are good.

Asparagus

The market is higher than last week; Mexican supplies are decreasing. Quality is best in Mexico: spears are straight and flavor is pleasantly grassy.

Avocados

Markets on most sizes are stable, with 70's and 84's getting heavy and their markets weakening. 60's and larger are fairly stable. Promotions for Cinco have helped keep the markets steady, and areas of the country that are now starting to warm up are seeing increased volume. This week will have less volume picked than previous weeks because of May Day and growers at higher elevations having more control over what is picked. CA shippers are in full production and able to cover much of the west coast business.

Bananas

Conventional supplies are strong along with rebounded supplies for organics and plantains. This strong supply should continue into the month of May. Quality is expected to be excellent.

Beans

EAST: Markets are settling as more supply comes to light from Plant City while Southern Florida wraps up their crop. Quality is excellent. WEST: The transition from MX to the desert is still occurring, allowing only limited supply available. FOBs are still high, but steady. Quality remains excellent.

MARKET ALERT

- Avocados - ESCALATED
- Cucumber - ESCALATED
- Green Leaf- ESCALATED
- Lemons- ESCALATED
- Limes - ESCALATED
- Mushrooms - ESCALATED
- Oranges - EXTREME



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Produce (continued)

Berries:

Blackberries

The market is steady. California supplies are limited, but Mexican stocks are becoming more plentiful due to higher seasonal temperatures. 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; stocks are scarce in Oxnard, California and Central Mexico. Quality is average: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

The market is up. Supplies are tight in both California and Mexico. There may be a harvesting gap over the next several weeks. Quality is good at best. Sugar levels range from 13 to 14 Brix.

Strawberries

Prices are level. California supplies are becoming more abundant in Oxnard, Santa Maria, and Watsonville, California; higher temperatures are increasing growth.

Bok Choy

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

Broccoli

Prices are forecast to remain low for at least another week; supplies are ample in both harvesting areas. New crop California quality is best: hollow core and yellow beading are problems.

Brussels Sprouts

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

Cantaloupe

We have started in a light way here in the Imperial Valley and will see some better volumes next week out of Arizona and the Imperial Valley. The first fruit looks very good with a clean net a nice internal color and descent sugars. The first fruit has been peaking on 12's and 5's and then in the next 2 weeks we will see the fruit size shift to heavy 9's and fewer small sizes. We will be in the Imperial Valley through June sand then start here on the Westside around the first of July.

Carrots

We are seeing both good quality and volume.

Cauliflower

Prices are high; volume is low. New crop California quality is best: creamy discoloration is an occasional problem.

Celery

The market is near the bottom. California supplies are plentiful; Florida stocks are adequate. Quality is very good: pith and growth cracking are minor issues.

Cilantro

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

Corn

Good volume continues on yellow and bi-color. The desert should ramp up in the next 7 to 10 days.



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Produce *(continued)*

Cucumbers

EAST: FOB markets are starting to slip just a bit as production has increased slightly from FL. Quality is starting to improve, however, there are still reports of heavy scarring from the farms.

WEST: Baja supplies are increasing, bringing support to Sonora's crop. FOBs are steady with good quality reports.

English Cucumber

There are excellent supplies crossing through Nogales and McAllen.

Eggplant

EAST: Supply is light, but steady. FOBs are steady. Quality is still only fair with most problems shown on external appearance.

WEST: A seamless transition is expected to take place as MX winds down and the desert begins. FOBs are steady and quality reports coming from both regions are positive.

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 is steady 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. Mexico has started on greens, reds will start this weekend and volumes will get better through next week. Coachella will start the first of next week and volume will ramp up by the week of the 14th. The Mexico volume is estimated at around 15-16 million cartons which is of normal crop volume, but less than last year's 20 million box crop. The Coachella Valley crop looks light on the front end and then more normal bunch counts from Memorial Day until the finish around the first of July. We will start here in the Central Valley around the first of July and go through December barring any major weather issues.

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 firm with good supply, although we are seeing some slight insect damage.

Honeydew

Market steady and strong 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. We will start some Arizona, Imperial Valley fruit the week of May 7th and then by mid-May we will see some better volumes. The overall honeydew volume in the ground is lighter than normal, and the overall supplies will be lighter than normal so the market will probably stay strong through the deal. We will also start some Westside volume around the first week of July and that will carry us through mid-October.

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.

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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 will be finishing harvesting Dist. 1 in the next few weeks. The Dist. 2 fruit does have some smaller fruit but we are size picking getting the larger fruit off the tree. The 165's and smaller are getting very tight and limited, expect prices to start strengthening especially on the smaller fruit. The overall quality is good with some good color and excellent juice content, but the choice will be a bit more scarred up due to dist. 2 wind scar and snail damage etc. and just an overall rougher texture.. We are expecting to finish here in Dist. 1 around the first week of May and then we will be dependent upon Dist. 2 fruit. There will be some of the first Argentinean lemons arriving in about three weeks as well, it is yet to be seen what the fruit will be but once we get the first inspections on that fruit we will keep you posted. The first of the Chilean will start to arrive around mid June as well. 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

Demand is good. Quality is average.

Green and Red Leaf

The market is high; supplies are limited. Quality is very good; tip and wind burn are occasional problems.

Iceberg Lettuce

Prices are up; Salinas Valley supplies are limited. Quality is excellent: although some heads are puffy with sporadic decay, harvesting crews are trimming outer leaves.

Romaine

Prices are low; Salinas Valley stocks are increasing. Quality is very good.

Romaine Hearts

Supplies are normal. Demand and quality are good.

Limes

The market is inching down; Mexican stocks are increasing. Large sizes (110- and 150-count) remain tight, but smaller fruit (200-, 230-, and 250-count) is in adequate supply.

Napa

Supplies are lower and demand is steady.

Onions

There are still old crop yellows shipping out of Idaho/Oregon from just a couple sheds although nothing is reported on the USDA. These onions are pretty old and quality has got to be a concern, particularly with a lot of nice new crop onions coming out of Southern Cal and Texas. Markets are off a little due overall availability nationally. Both CA and TX are reporting good yields and good quality right now. Overall prices should remain steady for the next seven days.

Oranges

Market very strong across the board demand exceeds supply on 88's, 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. We will start some Valencia's 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 bloom for next year's crop was real heavy but we are experiencing some heavy bloom drop already and there are several different stages of the blooms due to our erratic weather we have had this winter. We will keep you posted going forward as we learn more over the next few months as to what next year's crop is looking like for Navels and Valencia's. 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.



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Produce (continued)

Parsley(Curly, Italian)

Quality is fair and supplies are good.

Green Bell Pepper

EAST: South Florida's crop is quickly declining with quality & supply. Luckily, Plant City is just starting to produce some light numbers, however, Georgia is still a few weeks away. FOBs are mostly steady but starting to creep upwards. Look for this trend to continue until Georgia can bring supply to the table. WEST: Nogales still has supply, but quality is quickly deteriorating. Most demand has shifted to the CA crop. Expect split market pricing because of the split quality conditions. CA prices are moving upward due to increase demand.

Jalapenos (Chiles)

EAST: Plant City has finally started their spring crop in a light way. This is bringing more supply to the east; however, quality is only fair. FOBs are steady. WEST: Baja & Chihuahua volumes are improving with good quality available for a higher price point. Sonora & Sinaloa are still harvesting, but are struggling with quality. This is creating a split market. FOBs for good quality product are still lingering a little higher than average, but expected to improve as supply improves.

Red and Yellow Bell Pepper

WEST: Reds & Yellows continue to be a challenge as MX completes their season. Shady skies have limited Canadian production, but this is expected to improve with good weather conditions in the forecast. FOBs have moved strongly upwards. We are seeing average quality and flavor is subtly sweet, but there are some trouble reports with discoloration and light shrivel.

Pineapple

Industry shifts to high volumes of 5s/6s are providing opportunities for lower priced large fruit. The industry has seen an increase in 7ct pineapples for arrival into the domestic market for next week, although not at significant volumes to reflect a price change. Excellent fruit quality will continue to be seen.

Idaho Potatoes

Markets are up on 70cts and larger, everything else is steady. Above that there is really nothing new to report, supplies are about the same, quality is good and the month of May will probably remain quiet.

Radishes

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

Salad Blends

Prices are steady; stocks are sufficient. Quality is good & inspectors are selecting the best fields for harvesting.

Snow and Sugar Snap Peas

Snow and sugar snap peas supplies are steady through Miami.

Spinach (Bunched)

Quality has improved and supplies are steady, but may tighten up.

Spinach (Baby)

Baby and clipped spinach supplies are good and quality has improved.

Spring Mix

Prices are average; Salinas Valley supplies are sufficient. Quality is improving: fringe burn is a slight problem in green tango (due to strong winds and warm weather).

Yellow Squash / Zucchini

EAST: **Quality is still the hot topic.** Over the last week, there has been some slight improvement, however, not nearly enough to provide relief. Georgia is scratching the surface and is expected to bring much needed help to the market place. FOBs are still high, but steady. WEST: Product is still tight as MX works through their still troubled crop. Quality is a large concern still with cool nights and high winds, resulting in slow growth cycles and heavy scarring. CA crop typically starts this time of year, however is delayed about 10-14 days. We will not see major relief until CA begins. FOBs are still high, but steady.



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Produce *(continued)*

TOMATOES-EAST

Rounds

Many South Florida farms are quickly wrapping up their spring seasons. Most production has now moved to the Palmetto/Ruskin area. Although all sizes are still readily available, extra-large is feeling some limited volume pressures. Thus, FOBs for 5x6 sizes are moving upward, with other sizes staying steady. Quality is still excellent. We expect supply & quality to remain healthy for another 2-3 weeks, pending weather conditions.

Romas

Another steady week for Roma production from the Palmetto/Ruskin region. Despite having lighter plantings over rounds, the harvest has been bountiful. Good supply paired with steady demand is keeping markets mostly level week over week. Quality is excellent. We expect supply & quality to remain steady for another 2-3 weeks, pending weather conditions.

Grapes

Even though there is still plentiful volume available, production was on the light side over the past week. With South Florida being out of the picture, the lighter volume is putting upward pressure on FOBs. Look for prices to increase a few dollars. Quality is still excellent.

Cherries

Supply has lightened up just a bit, driving FOBs up. However, good steady supply is still expected for another few weeks. Quality continues to be excellent.

TOMATOES-WEST/MEXICO

Rounds

Western Mexico will continue their seasonal decline through the month of May. Quality and supply from this region remains solid. Baja has begun tapping their fields with good volume & quality so far. With plentiful volume from the west available, FOBs from all regions continue to linger at or around the minimum suspension agreement. Quality overall is nice, however, there are some trouble reports coming from older fields.

Romas

Great supply and quality is coming from multiple regions, Western MX, Northern MX, and Baja. FOBs hover at the minimum for yet another week. Great supply is expected to last through May (weather permitting) and quality is excellent.

Grapes

Supply continues to decline due to weather and quality issues. As mentioned in last week's report, this is creating a split FOB market. We are seeing quality issues with product priced lower than market value. Higher quality is demanding a higher price point.

Cherries

Nogales product continues to show major quality issues. While Baja's product is a little better, it is still not good enough to support high quality demands. Thus, many are moving their purchasing to the Florida crop even through freight costs are a bit higher.

Watermelons

The market is steady; stocks are abundant. Quality is average: melons are juicy and flavor is sweet. Sugar levels are increasing and quality is improving due to higher seasonal temperatures.

