



MARKET TRENDS

FOR WEEK ENDING AUGUST 10, 2018

 **PERFORMANCE**
FOODSERVICE

MARKET TRENDS

AUGUST 10, 2018

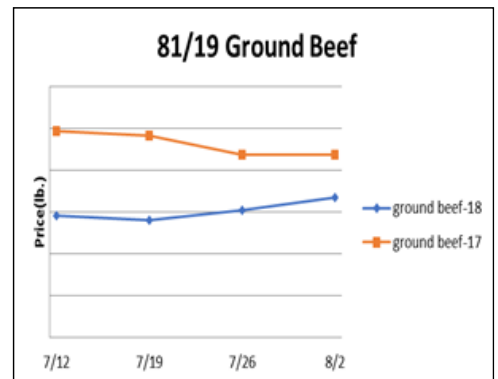
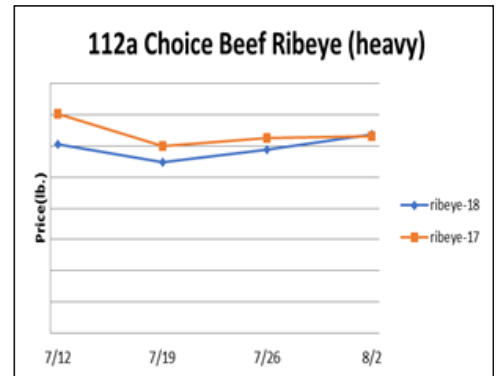
PERFORMANCE
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Beef, Veal & Lamb

Beef output last week rose .9% and was 1.4% better than the same week last year. The July 1st cattle on feed inventory was 4.3% larger than 2017 with June placements into feedlots up by 1.3%. But, the average placement weight was down 3 pounds from the prior year. Slaughter ready cattle supplies should be sufficient in the near term, but there is some concern that cattle numbers could tighten this fall. Solid retail feature activity is occurring and anticipated to persist into the Labor Day holiday. This should boost demand and support ground beef and steak cut prices in the near term. Since 2013, the average move for the choice ribeye market during the next four weeks was 5.6% higher.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Decreasing	Short	Lower
Feeder Cattle Index (CME)	Increasing	Short	Lower
Ground Beef 81/19	Increasing	Good	Lower
Ground Chuck	Increasing	Good	Lower
109 Export Rib (ch)	Increasing	Good	Higher
109 Export Rib (pr)	Decreasing	Good	Lower
112a Ribeye (ch)	Increasing	Good	Higher
112a Ribeye (pr)	Increasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Increasing	Good	Higher
116 Chuck (sel)	Decreasing	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)	Decreasing	Good	Lower
121d Inside Skirt (ch/sel)	Decreasing	Good	Higher
121e Cap & Wedge	Increasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Lower
168 Inside Round (ch)	Increasing	Good	Lower
169 Top Round (ch)	Increasing	Good	Lower
171b Outside Round (ch)	Decreasing	Good	Lower
174 Short Loin (ch 0x1)	Decreasing	Good	Higher
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)	Decreasing	Good	Lower
184 Top Butt, boneless (pr)	Steady	Good	Higher
184-3 Top Butt, bnls (ch)	Decreasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Higher
185c Loin, Tri-Tip (ch)	Decreasing	Good	Lower
189a Tender (sel, 5 lb & up)	Increasing	Good	Lower
189a Tender (ch, 5 lb & up)	Increasing	Good	Lower
189a Tender (pr, heavy)	Decreasing	Good	Lower
193 Flank Steak (ch)	Increasing	Good	Higher
50% Trimmings	Increasing	Good	Lower
65% Trimmings	Increasing	Good	Lower
75% Trimmings	Steady	Good	Lower
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



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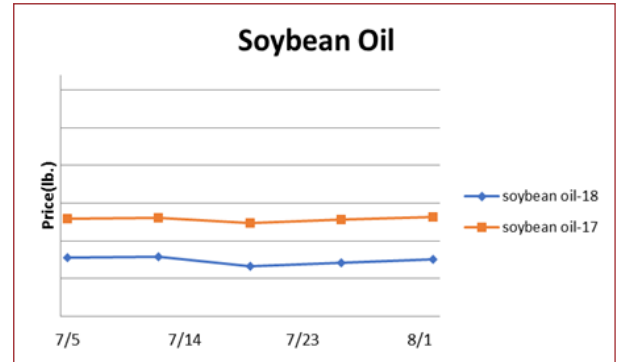
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Grains

The wheat markets have firmed as of late with Minnesota spring wheat climbing to a nine-week high. Weather challenges globally have put in question some pending wheat production forecasts. That said, wheat prices may correct modestly downward in the near term but could have more upside potential before September.

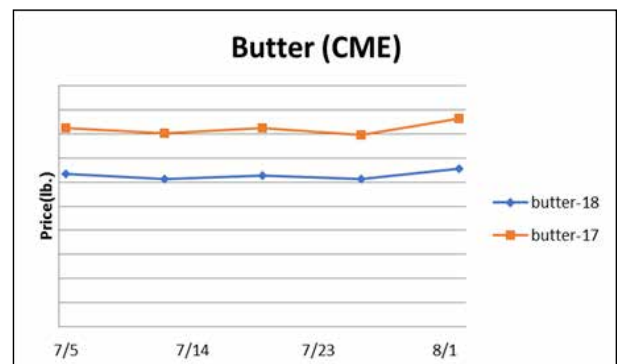
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher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



Dairy

CME butter prices have found modest support lately. June 30th U.S. butter stocks were 8.5% more than a year ago and 19.1% larger than the five-year average for the date. This factor and active production have tempered this summer's price gains. Still, export demand and seasonally fading output could support the butter market this month. June 30th cheese inventories were 5.7% bigger than a year ago. U.S. cheese supplies remain historically high and recent import tariffs from Mexico may limit expected seasonal price gains. The cheese markets usually trend higher in August.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Lower
Cheese Blocks (CME)	Decreasing	Good	Lower
American Cheese	Increasing	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)	Increasing	Good	Lower
Nonfat Dry Milk	Increasing	Ample	Lower
Whey, Dry	Increasing	Good	Lower
Class 1 Base	Steady	Good	Lower
Class II Cream, heavy	Decreasing	Good	Lower
Class III Milk (CME)	Decreasing	Good	Lower
Class IV Milk (CME)	Increasing	Good	Lower



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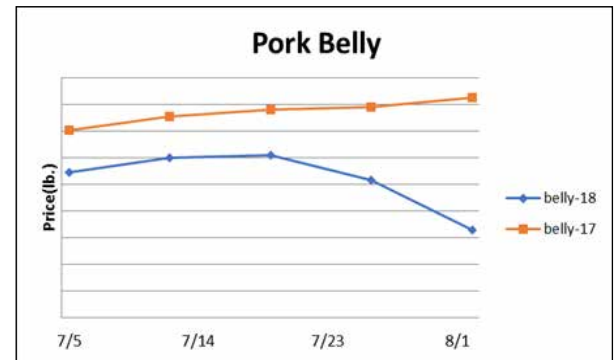
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Pork

Pork output fell 16.8% last week and was 10.6% smaller than a year ago. Note: the USDA now excludes lard from their weekly output data. Year-over-year pork production gains are likely into the fall due in part to solid hog numbers. This hints that the upside risk for the pork markets may be limited. June 30th U.S. pork inventories were .2% more than 2017 with ribs (3.3%), trimmings (38%) and bellies (130%) holdings higher. But, picnics (-5.6%) and hams (-16.5%) were lower. The USDA pork cutout usually weakens through early-September.

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)	Increasing	Good	Lower
Loin (bone in)	Increasing	Good	Lower
Babyback Rib (1.75 lb & up)	Decreasing	Good	Lower
Tenderloin (1.25 lb)	Increasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Increasing	Good	Higher
Picnic, untrmd	Increasing	Good	Lower
SS Picnic, smoker trm box	Decreasing	Good	Lower
42% Trimmings	Decreasing	Good	Lower
72% Trimmings	Increasing	Good	Lower



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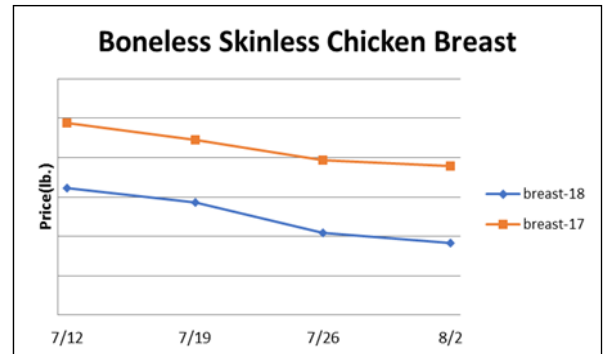
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Poultry

Chicken output for the week ending July 21st rose .1% from the previous week and was 1.1% larger than the same week in 2017. Currently, year-to-date chicken production is trending only modestly more than last year. Yet, output is forecasted to track 2.1% above a year ago from July through December. The chicken breast markets are the lowest for this time of year since at least 2008. Anticipate strong feature activity for boneless skinless chicken breasts as the Labor Day holiday approaches which should influence prices higher. Since 2013, the average price move for the ARA Chicken Breast Index during the next three weeks was up 3.2%. Look for bone-in chicken wing prices to appreciate in the coming weeks as football season nears.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Decreasing	Good	Higher
Wings (jumbo cut)	Decreasing	Good	Lower
Wing Index (ARA)	Decreasing	Good	Lower
Breast, Bnless Skinless NE	Increasing	Good	Lower
Breast, Bnless Skinless SE	Decreasing	Good	Lower
Breast Boneless Index (ARA)	Decreasing	Good	Lower
Tenderloin Index (ARA)	Steady	Good	Lower
Legs (whole)	Decreasing	Good	Lower
Leg Quarter Index (ARA)	Decreasing	Good	Lower
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	Lower
Liquid Whole Eggs	Decreasing	Short	Higher
Liquid Egg Whites	Decreasing	Short	Higher
Liquid Egg Yolks	Decreasing	Short	Higher
Egg Breaker Stock Central	Steady	Short	Higher



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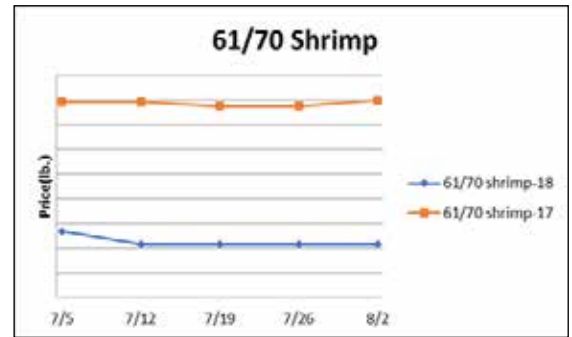
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Seafood

Despite a firm U.S. dollar which is encouraging seafood imports, worldwide demand for seafood remains strong. Most domestic seafood markets are pricing above year ago levels, except shrimp. The greenback looks poised to remain firm which will make the U.S. an attractive buyer. Still, the various seafood markets will likely price above 2017 levels into the fall.

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	Higher
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	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	Steady	Good	Higher
PE-LLD-can liners, film, bags	Steady	Good	Lower

Retail Price Change from Prior Month

Description	Jun-18	May-18	Apr-18
Beef and Veal	Increasing	Decreasing	Increasing
Dairy	Increasing	Decreasing	Decreasing
Pork	Decreasing	Decreasing	Decreasing
Chicken	Increasing	Decreasing	Increasing
Fresh Fish and Seafood	Increasing	Decreasing	Increasing
Fresh Fruits and Vegetables	Decreasing	Increasing	Increasing

Various Markets

Nearby cocoa futures have fallen notably, recently pricing at the lowest level since February. The cash cocoa markets in West Africa have been under pressure which is a sign that current supplies are abundant. Still, worldwide chocolate demand is strong. The \$2,000 price level for cocoa is key support.

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	Higher
Cocoa mt ICE	Decreasing	Short	Higher
Orange Juice lb ICE	Increasing	Good	Higher
Honey (clover) lb	Decreasing	Good	Higher



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Produce

Market Overview

Most commodities are steady. Valencias are still in an ACT OF GOD with higher prices and shortages in supply. Lemons are also in an ACT OF GOD. Avocados are currently EXTREME, and Romaine commodities are steady.

Watch List

Limes

We are seeing somewhat of an active market on limes. There may be an increase in price and a slightly tighter supply.

Apples & Pears

The market is stable. Storage crop Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are available. Sugar levels range from 14 to 18 Brix. New crop Washington Galas will hit the market in mid-August; Golden Delicious, Granny Smith, and Red Delicious apples will be available in September.

Pear prices are steady. New crop California Bartletts are on the market; Washington Bartletts will become available in mid-August, followed by D'Anjous in early September. Red D'Anjous and Argentine supplies are on the market. Overall quality is excellent: sugar levels vary from 12 to 14 Brix.

Artichokes

Quality is excellent, and demand is good.

Arugula

Quality and supplies are fair.

Asparagus

Prices are unchanged; stocks are abundant. Quality is average: spears are straight, tips are closed, and flavor is subtly grassy.

Avocados

The market is elevated. California stocks are decreasing. Mexican supplies are tight; poor weather earlier this summer damaged blooms and reduced overall volume. Quality is good: oil content is high.

Bananas

Banana volumes are expected to be sufficient with high quality fruit coming into the market. The growing conditions are good as the anticipation of the 2018-19 school year is upon us.

Beans

The bean deal out the East remains firm due to weather-related quality issues. West coast supplies are hit or miss, but we should see some relief over the next two weeks.

MARKET ALERT

- Avocados- EXTREME
- Lemons - ACT OF GOD
- Mushrooms - ESCALATED
- Oranges (Valencias) - ACT OF GOD



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Produce (continued)

Berries:

Blackberries

Prices are level. California berries are sufficient. Quality is average: berries are plump and juicy with sweet, yet slightly tangy flavor. Sugar levels vary from 12 to 13 Brix.

Blueberries

The market is stable; stocks are becoming more plentiful in Santa Maria and Watsonville, California. Domestic quality is best: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

Prices are weak; summer supplies are ample. Quality is very good: berries are plump and sweet. Sugar levels vary from 13 to 14 Brix.

Strawberries

The market is easing; ample supplies are expected through September. Higher-than-normal day temperatures are increasing volume, but are affecting quality in some lots. Cold-chain management remains a vital component of maximizing shelf-life.

Bok Choy

Quality is average, and demand is fair.

Broccoli

Prices are low in both regions; expect ample stocks through the summer barring any unforeseen weather challenges. Overall quality is very good: heads are compact with deep color and firm-yet-tender texture, yet flowering is a minor issue in some lots.

Brussels Sprouts

Supplies are light, and quality is good. Prices are steady.

Cantaloupe

Market wide spread due to quality, we are going with good volumes out of the Westside and overall quality is very good, most of the varieties like ESL Harper are very strong but sugar is only fair. We are peaking on 9's and jumbo 9's and the smaller fruit is a little tougher to come by. We will be getting into some better supplies of the smaller fruit in the coming weeks.

Carrots

We are seeing both good quality and volume.

Cauliflower

The market is near the bottom; volume is high. California quality is best: heads are snowy white and firm.

Celery

Prices are low; California stocks are ample. Quality is very good: pith and growth cracking are minimal.

Cilantro

Supplies are light due to quality.

Corn

Good volume continues to become available on yellow and white product out of the San Joaquin Valley corn market (yellow, white and bi-color). Good supplies are also available out of Carolinas, Indiana and Illinois.

Cucumbers

Great volume continues from the East with steady FOBs and plenty of local deals available. The hot temperatures in the West are causing a decrease in volume which is driving FOBs upward. Quality is fair to good.

Eggplant

Great volume continues from the East with steady FOBs and plenty of local deals available. The hot temperatures in the West are causing a decrease in volume which is driving FOBs upward. Quality is fair to good.



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Produce (continued)

Fennel

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

Garlic

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 as we are finished with Mexico and Coachella Valley and have started in the Central Valley which will take us through December. The crop here in the central valley is looking very good as we have a good set and the fruit is fairly consistent in size. We are expecting to have good quality fruit through the year barring any major weather situations, and the estimated volume is about 114 million packed cartons.

Green Cabbage

Supplies continue to improve throughout the Midwest. Sizing is still smaller with larger product availability slowly improving. West coast volume and prices are mostly stable.



Red Cabbage

Markets are a bit tighter as lighter numbers are still coming out of Ohio. Quality has been hit or miss while sizing remains good. Central coast production is good; however, with lighter volume in the East, the market has firmed up in the West.

Green Onions

Iced - The market remains sluggish due to crossings from New Mexico and plenty of local home grown in eastern growing areas. Iceless - The market is good and should remain steady.

Honeydew

Honeydew: Market is steady with good supplies of 5's, 6's and 8's on the Westside and overall quality is very nice and sugars are very good as well. We will be going through mid-October on the Westside now.

JICAMA

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

Kale

Quality and supplies are good.

Kiwi

Good supplies available on Chilean product.

Lemons

They are a mess--Demand far exceeding supply on all sizes fancy and choice. Market is extremely strong, D2 is not producing enough fruit and we are running into gaps in supply also due to the extreme heat that hit the central coast and Los Angeles region. D2 will see generally good quality however will see some more wind scarring and possible snail damage on the coastal fruit as well as soft fruit due to the heat. Argentine has not been a factor to ease any supply situation for the imports due to an insect issue and we may not see any volume from them due to this situation, we will keep you posted as we learn more. Chilean is very slow in getting to us, with the global market conditions growers in Chile are sending more fruit to other parts of the world than the U.S. at this point. We are expecting the Chilean supply will get better and more consistent later part of July or first of August, but that remains to be seen. Mexican imports should start in the next few weeks also but expect to see a lighter crop by about 40% due to past weather conditions. We expect a very strong market throughout the summer months, and into September.

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Produce *(continued)*

Lettuce:

Butter

Supplies are lighter than normal. Demand is good, and quality is average.

Green and Red Leaf

Red leaf quality is good. Demand is average, and supplies are normal. Green leaf supplies are normal showing good demand and quality.

Iceberg Lettuce

Supplies are lighter, and we should see this market get tighter. Quality is good.

Romaine

Supplies are slightly above normal. Demand is average, and quality is good with occasional light fringe burn.

Romaine Hearts

Supplies are slightly above normal. Demand is average, and quality is good.

Limes

The market is climbing. Hot weather is causing quality problems and shortening shelf-life; growers must cull more fruit than normal. Ordering for quick turns is recommended.

Napa

Supplies and demand are steady.

Onions

Many growers also will start our Idaho/Oregon onions next week. To begin most will only have yellows (jumbos and colossal) and because of that growers will keep most manifests in New Mexico. There are some deals on straight load volume on jumbo yellows if that's of interest. Most growers red onions should be ready in another two weeks and at that time grower shippers will be transitioning everyone back to Idaho/Oregon for their onions.

Oranges

Market very strong across the board, Valencia's are starting to peak on mid sizes so we are seeing fewer of the small ones. It is also a lighter crop so we will be fighting supplies of fruit through the remainder of the summer until we start navels around the first of November. The overall quality of the Valencia's is good with descent color some green tinge which is normal for Valencia's and fruit is not near as firm as a navels, juice and sugar content is very good. The bloom for next year's navel 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. Please be aware that we are in a Heat Wave that could last up to 3-weeks (101-108), you will see green color on the Valencia's, and also keep in mind that this fruit is about 16 months old on the tree, and the trees are also carrying next year's crop which puts lots of stress on the tree especially when our weather is hot and that is when we see re-greening and softer fruit.



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Produce (continued)

Parsley(Curly, Italian)

Quality is fair and supplies are good.

Green Bell Pepper

In the East, the green bell pepper market is higher than usual. There are plenty of local offerings, but no major volume to meet full demand. Once Michigan begins next week we will see FOBs decline. Quality is mixed by region. In the West, with Bakersfield mostly out of the mix, Stockton and Coastal CA are lighter than expected this week firming prices up this week. Quality is good along the coast and the inland areas are seeing some quality issues related to heat.

Jalapenos (Chiles)

Supplies remain steady in the East on core pepper varieties while quality in the west is hit or miss as transition on domestic product is slow to start. Baja continues crossing decent quality on the core line of product.

Red and Yellow Bell Pepper

The market is starting to inch down; California supplies are plentiful. Quality is very good: peppers are deeply colored and subtly sweet.

Pineapple

The market is inching up; Costa Rican supplies are tightening. Quality is very good: fruit is tangy and juicy. Sugar levels are high, ranging from 13 to 16 Brix.

Idaho Potatoes

Over the next three weeks you will see sheds slow finish their Burbanks and move to new crop. The early Norks look to have a large size profile with very few #2's. Fob prices will adjust as more sheds transition. The market is fairly weak but look for it to get strong when the new crop starts.

Radishes

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

Salad Blends

Prices are unchanged; iceberg and romaine supplies are plentiful. Quality is very good: Inspectors are closely monitoring pack-outs for chunks and core material to reduce potential problems.

Snow and Sugar Snap Peas

Snow and sugar snap peas supplies are steady through Miami and prices are higher.

Spinach (Bunched)

Supplies and quality are fair due to wind burn and heat damage.

Spinach (Baby)

Baby and clipped spinach supplies are good, and quality is fair.

Spring Mix

The market is low; Salinas Valley supplies are ample. Quality is very good: decay and yellowing are periodic issues near the end of product shelf-life.

Yellow Squash/Zucchini

Although the growing regions are very fragmented in the East, there is still plenty of squash to go around. FOBs are steady. Quality continues to be nice from all regions with the exception of occasional scarring on yellow squash. In the West, Santa Maria is producing great quality. This is a result of Baja going through a short gap period with lighter than usual supplies. However, there is still enough product to meet demand.



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Produce (continued)

TOMATOES (EAST)

Rounds

Rain has stalled harvest for the last 3 days; however, it hasn't affected total volume available. FOBs are steady with plenty of fruit available. Prices may increase in the next 7 days if the rain continues. Quality has not been affected. Fruit is excellent from all regions.

Romas

Product is available in many local areas in the East with Tennessee and Alabama being the primary areas. FOBs are mixed this week and quality is excellent from all areas.

Grapes

Supplies are primarily coming from Virginia; continued rain will delay harvesting day to day causing markets to remain firm. Quality is still good despite the rain.

Cherries

Supplies are steady out of Tennessee and Virginia; FOB prices are steady, and quality is still good despite the rain.

TOMATOES (WEST)

Rounds

Big volume is still coming from the West. Some growers are slowing production due to the abundance of supply and lack of demand. However, this is not having an effect on FOBs. Market prices will remain the same into next week. However, there is a somewhat split market with lower quality fruit available for a rock bottom price. Temperatures continue to press close to above the 100-degree mark, impacting quality. Most CA tomatoes are soft, full red and have a very short shelf life.

Romas

The market continues to firm up on the West Coast due to lighter supply, Quality is varied farm to farm, but overall it has been decent.

Grapes

Baja & Eastern Mexico are both producing only moderate supply. FOBs prices have eased back this week. Quality remains excellent.

Cherries

Baja's supply has tightened up just enough to push prices upward. Good quality is still available.

Tree Fruit

Prices are unchanged; California volume is average. Quality is very good: nectarine and peach sugar levels range from 10 to 12 Brix, while plums vary from 12 to 16 Brix.

Watermelons

The market is near the bottom; supplies are plentiful in the majority of growing areas. Quality is very good: melons are juicy and flavor is mildly sweet. Sugar levels range from 11 to 12 Brix.

