



# MARKET TRENDS

FOR WEEK ENDING MARCH 30, 2018

 **PERFORMANCE**  
FOODSERVICE



# MARKET TRENDS

MARCH 30, 2018

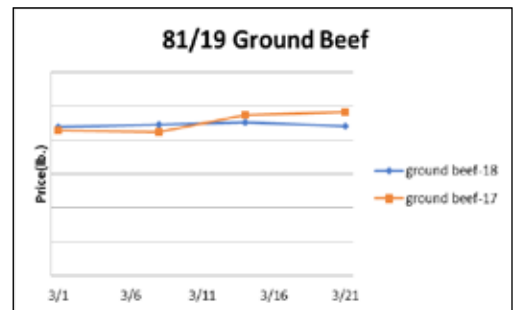
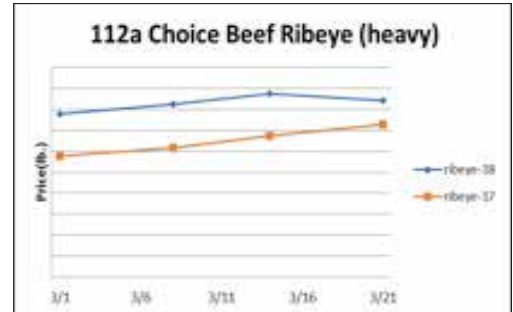
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## Beef, Veal & Lamb

Beef production last week declined .4% but was up 1.8% from the same week last year. Near slaughter ready cattle supplies are forecasted to be plentiful during the spring which should encourage strong year over year gains in beef output. The USDA is forecasting Q2 2018 beef production to be 12.8% bigger than the previous year and the largest for any quarter since at least 2009. This should limit the upside in the steak middle meat markets during the next several months. However, strong retail feature activity could limit the downside in many of the beef items. Since 2013, the average price move for the 180 OX1 choice strip from early-April through early-June was 25.2% higher.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Decreasing	Short	Higher
Ground Beef 81/19	Decreasing	Good	Lower
Ground Chuck	Decreasing	Good	Lower
109 Export Rib (ch)	Increasing	Good	Higher
109 Export Rib (pr)	Decreasing	Good	Lower
112a Ribeye (ch)	Decreasing	Good	Higher
112a Ribeye (pr)	Decreasing	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)	Increasing	Good	Lower
120 Brisket (ch)	Decreasing	Good	Higher
120a Brisket (ch)	Increasing	Good	Higher
121c Outside Skirt (ch/sel)	Increasing	Good	Higher
121d Inside Skirt (ch/sel)	Increasing	Good	Lower
121e Cap & Wedge	Increasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Lower
168 Inside Round (ch)	Decreasing	Good	Lower
169 Top Round (ch)	Increasing	Good	Lower
171b Outside Round (ch)	Increasing	Good	Lower
174 Short Loin (ch OX1)	Decreasing	Good	Lower
174 Short Loin (pr 2x3)	Decreasing	Good	Lower
180 OX1 Strip (ch)	Increasing	Good	Lower
180 OX1 Strip (pr)	Increasing	Good	Lower
184 Top Butt, boneless (ch)	Increasing	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	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	Decreasing	Good	Lower
65% Trimmings	Decreasing	Good	Higher
75% Trimmings	Steady	Good	Higher
85% Trimmings	Decreasing	Short	Higher
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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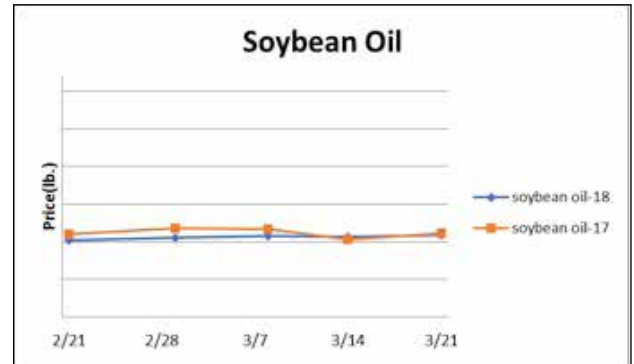
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## Grains

Both hard red winter wheat in the Southern Plains and soybeans and corn in Argentina have received much needed rainfall during the last week. However, crops in both areas are likely to be historically small. Record soybean plantings in the U.S. could limit the upside in the soybean complex this spring.

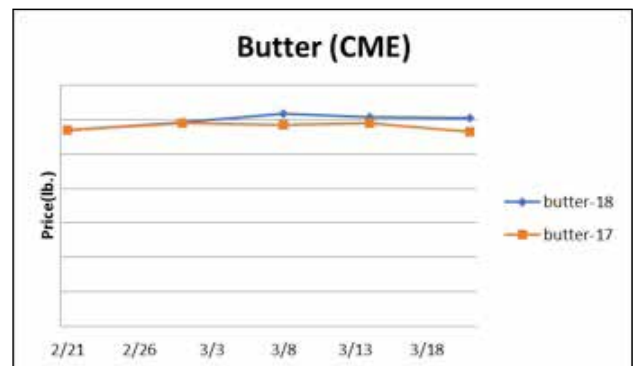
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Higher
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Higher
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Higher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

U.S. milk output growth remains respectable. During February, U.S. milk output was 1.8% bigger than last year due to a .5% larger milk cow herd and a 1.3% gain in milk cow yields. Milk farmers added a net 1,000 head to the herd during the month making it the largest since 1996. Milk producer margins in the U.S. have suffered this winter which suggests that the milk cow herd growth could slow or end in the coming months. Eventually this would be supportive of the dairy markets. Cheese prices have been firm and could be range-bound during April. Butter prices are steady.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Higher
Cheese Blocks (CME)	Increasing	Good	Higher
American Cheese	Steady	Good	Higher
Cheddar Cheese (40 lb)	Decreasing	Good	Higher
Mozzarella Cheese	Decreasing	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)	Decreasing	Good	Lower
Class IV Milk (CME)	Decreasing	Good	Lower



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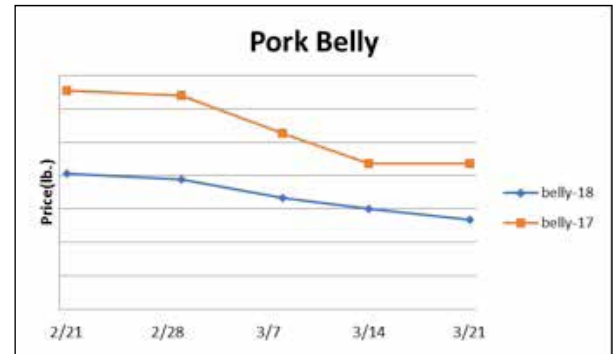
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## Pork

Pork output last week rose .6% and was 4.2% more than the same week in 2017. Hog weights over the last six weeks have averaged .9% heavier than a year ago. This has contributed to big year over year gains in weekly pork production which is expected to persist during the next few months. Wholesale pork belly prices are the lowest in five months due in part to higher inventories compared to last year. Still, more active food service featuring of bacon is likely this spring. Typically, the wholesale pork belly markets weaken during April.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Decreasing	Ample	Lower
Sow	Decreasing	Ample	Higher
Belly (bacon)	Decreasing	Good	Lower
Sparerib(4.25 lb & down)	Increasing	Good	Higher
Ham (20-23 lb)	Decreasing	Good	Lower
Ham (23-27 lb)	Decreasing	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	Lower
Picnic, untrmd	Decreasing	Good	Lower
SS Picnic, smoker trm box	Decreasing	Good	Lower
42% Trimmings	Increasing	Good	Higher
72% Trimmings	Decreasing	Good	Lower



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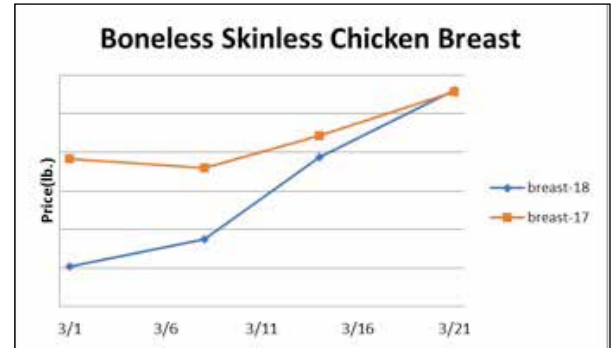
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## Poultry

For the week ending March 10th, chicken output increased 1.6% from the prior week and was 2.1% better than the same week last year. The six-week average for chick production is trending 1.8% above the prior year. The USDA is forecasting Q2 chicken output to be 2.6% stronger than last year. This should temper seasonal price gains for chicken breasts and tenders this spring. Over the last five years, the average move for the ARA chicken breast index during the next nine weeks was 22.6% higher. Since 2013, the average move for the ARA chicken tender index over the next nine weeks was up 19.9%. Total protein supplies in Q2 are expected to be 790 million pounds more than Q1 which is another factor which can limit chicken price appreciation.

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



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

## Eggs

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



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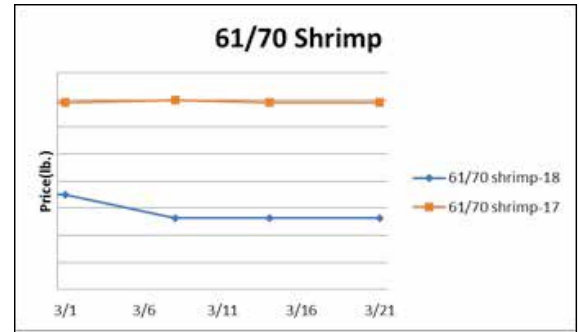
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## Seafood

Snow crab leg prices continue to track well above the previous year. U.S. imports of snow crab during January were 39% less than 2017. The Alaskan snow crab fishing season is winding down with 96% of the historically small quota landed. The 2018 Newfoundland quota is likely to remain near a two-decade low which could underpin snow crab prices.

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	Higher
Tilapia Filet, frz	Steady	Good	Lower
Cod Filet, frz	Steady	Good	Lower
Tuna Yellowfin, frsh	Steady	Good	Higher
Salmon Atlantic Filet, frsh	Steady	Good	Lower
Pollock Filet, Alaska, frz	Steady	Good	Higher



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## Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
<b>WOOD PULP (PAPER)</b>			
NBSK- Paper napkin	Increasing	Good	Higher
42 lb. Linerboard-corrugated box	Decreasing	Good	Higher
<b>PLASTIC RESINS (PLASTIC, FOAM)</b>			
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	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 canned tomato markets have softened some this winter. The USDA is estimating 2018 tomato for processing tonnage in California at 12 million, 4% bigger than the previous crop but the second smallest since 2013. The downside risk in the canned tomato markets is likely only modest.

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

Iceberg lettuce supplies are improving. Total shipments last week rose 13% from the previous week and were just 3% less than the same week last year. The principal lettuce harvest area is beginning its transition to Huron, California. This is being accompanied with adverse weather which could cause lettuce supplies to be erratic during the next several weeks. Consequently, fairly volatile lettuce prices are anticipated. The tomato harvest in Florida remains subpar. Tomato prices could remain firm in the near term. Most growers will start transitioning to Salinas now and over the next few weeks. California has experienced extreme rain over the past few days and quality on a majority of commodities will most likely be affected on in those areas. We will be watching the market closely and will be sure to keep you updated. Broccoli has improved, while strawberries are showing quality issues and high prices.

## Watch List

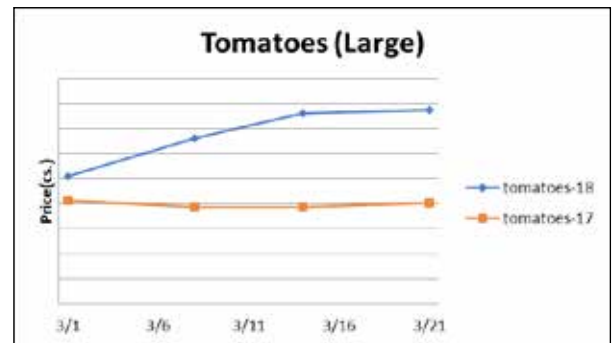
Due to the recent weather, quality on commodities such as celery, lettuce, berries, citrus, broccoli and cauliflower in California markets has been affected.

## Strawberry Report

Spring has come to CA on schedule! All 3 of the CA growing regions Salinas/Watsonville, Santa Maria and Oxnard began receiving rain yesterday and are exceeding an inch of precipitation as of this morning. Showers are forecasted to continue throughout the day today and into tomorrow bringing total precipitation amounts in the range of 2.00-6.00" varying by area and report. This is all coming after they received rain through much of the regions last week so some of the ground was already saturated. With this amount of rain, crews are unable to harvest our fields today and could very likely be out of production through the balance of the weekend. By early next week, crews will go in to clean up the fields and determine when we can begin to pack fresh again. Salinas/Watsonville production will continue to be delayed until we have some dry and warmer weather to bring the fruit on, it looks like the 3rd week of April before production begins. Florida growing regions began receiving heavy rain yesterday afternoon along with high winds and reports of hail in some areas. This was scheduled to be the last week picking in FL for most but the weather has hastened the end of most of the production there. If crews are able to get back in, it will be to harvest very minimal volume for the balance of the week then they will be done. Although the timing could not be worse with Easter berry demand upon us, this rain is much needed in areas of CA and we'll reap the benefits of it later in the year.

## MARKET ALERT

- **Asparagus – ESCALATED**
- **Avocados – ESCALATED**
- **Lemons – ESCALATED**
- **Limes – EXTREME**
- **Mushrooms – ESCALATED**
- **Oranges – ESCALATED**
- **Strawberries – ESCALATED**





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## Produce

### 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. 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 due to the winds and colder weather.

### 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, 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 this week will limit local harvesting.

### Bananas

Demand on this item remains firm; however, prices are gradually easing. 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. We expect fruit to be greener than average for the next several weeks until inventories re-balance with riper fruit becoming available. We ask for your patience and understanding during this time as fruit will certainly be greener and might need to be stored on site to further ripen.

### Beans

East: Great growing conditions in South Florida and the Lake area are keeping supply plentiful and quality good. Markets are steady.

West: As blocks in Culiacan wind down; we are seeing upward pressure on FOBs. Quality however is great.

### Berries:

#### Blackberries

The market is stable. Warmer Mexican weather will increase volume over the next several weeks. 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 elevated; rainy weather and lower-than-normal temperatures continue to tighten supplies in the main growing regions of Oxnard, California and Mexico. Quality is average: chill damage and shriveling are occasional issues being caused by precipitation.

#### Raspberries

The market is stable. CA stocks remain limited due to rainy, cold weather. 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 range from 13 to 14 Brix.

#### Strawberries

Expect limited California supplies due to rain. Harvesting in Mexico (into South Texas) and Florida is winding down for the season. Prices will remain active as demand shifts to CA.

#### Bok Choy

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



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## Produce *(continued)*

### Broccoli / Broccoli Florets

Supplies are normal. Quality is average.

### 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 for the next month and then start to get a bit stronger 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 higher prices, although they have improved.

### 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.



### Corn

This market has firmed up due to the cooler weather. We anticipate improved volume over the next 2 weeks.

### Cucumbers

East: Offshore is expected to be wrapped up by next week and FL has finally begun. FOBs are starting to slowly decline. FL quality is looking very nice so far. Beware of the end of the Honduras crop and the possibility of end of season quality issues.

West: Supply is improving as Baja gets rolling and is expected to ramp up over the next few weeks. FOBs are weakening and quality remains solid.

### English Cucumber

There are excellent supplies crossing through Nogales and McAllen.

### Eggplant

East: Good steady supply is coming from the east as farmers tap into new fields. Prices remain low and quality is improving.

West: Steady supply, steady demand and steady pricing is the story this week from MX. Quality is good.

### 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

There is good supplies of Reds and green son both coasts from Chile, the overall quality is all over the board as well as prices due to quality. The flames are showing some blowers upon arrival and most are having to be repacked, the crimsons that are arriving are looking good with good sugar and very nice color. There will be good supplies through March and then we will see things start to strengthen as the volumes start to decrease. We will start here in California and Mexico around the first week of May and possibly start sooner as the weather in the desert has been much warmer than normal.

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## Produce *(continued)*

### Green Cabbage

Supplies have tightened and markets have firmed in the East. We are seeing improving volume and lower FOB prices in the West, and quality remains favorable.

### Red Cabbage

Quality and sizing have been great showing good color. The market remains firm in the East as well as Texas. West Coast volume is improving.

### Green Onions

Market is better. Expect slightly higher pricing in 2 weeks due to Easter and better demand.

### Honeydew

Market steady with good demand across the board on all sizes, they are on the tight side here on the west coast until we see some more volume coming in this weekend. 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 fair.

### Kiwi

California supplies are tighter this week, but quality is good. Lighter supplies are also expected on Italian fruit coming through the East Coast. Markets are firming up.

### Lemons

Market is steady with better supplies on most all sizes as demand has been fair as we are picking in dist. 1 and dist 2 and, with the heaviest volume coming from Dist. 1. The fruit quality is fair to good as the warmer than normal weather just weakens the fruit and also the trees are flushing with blooms which takes away some of the nutrients from the existing fruit and deters nutrients to the new growth and blooms. The Dist. 1 crop is going to get us through the end of April possibly into the first of May and then we will be dependent upon Dist. 2 until we see the Chilean fruit start to arrive around the first week of June. We expect the market to start to strengthen around the third to fourth week of March, which all depends on how much Freeze damage we got the last 2 nights.

### 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. The market is active as production continues to be lighter than normal.

#### Romaine

Quality and prices are average. Supply is lower than normal.

#### Romaine Hearts

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

#### Limes

Prices are high; supplies are limited, especially large sizes, due to bloom drop several months ago and the upcoming Easter demand. Quality is very good: the new crop is ramping up.

#### Napa

Supplies and prices are steady. Quality is good.

#### Onions

Demand has increased, but Mexico continues to cross more supplies each day. With this, there has been a downward pressure on pricing for all colors of the onion market. Texas is roughly one week away from shipping domestic product and they are expected to have a good supply as well. The imperial valley is expected to start around April 15th and all indications are showing they will also have a good supply of onions. We are expecting to see the current market trends continue through transition until regions finish.



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## Produce *(continued)*

### Oranges

Market steady on all sizes, the demand has been good but not demand exceeds as we have been over the last few months. We finally got some descent rains this last weekend and are expected to see some more rain later this weekend and into next week. The temperatures have been cooler than the first part of the year which will hopefully help to firm it up a bit, but when it warms back up the puff and crease and probably a little more fruit drop will start. We are still dealing with a crop that is actually about 30%-40% lighter than normal so we will see this market strengthen as we progress through the season especially on the 88's and smaller. We are getting the fruit that is not gibbed off the tree and will start gibbed next week, which will be a bit firmer and stronger fruit to finish the season. These late rains that are expected is packing the mountains with some much needed snow which will help with our water situation.

### Parsley

(Curly, Italian) Quality and supplies are fair.

### Green Bell Pepper

East: Both coasts of FL are producing solid numbers. J, XL & LG are the most snug while choice and smalls are more available. Prices are mostly steady on big fruit while there are deals out there on choice.

West: MX crops are past their peak and starting to wind down with California crop on the horizon to start mid-April. There is still good supply coming from MX, however, J/XL are the tightest, therefore, prices are still a little high on J/XL while choice is low and readily available. Quality overall is good.

### Jalapeño 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 is harvesting. All sizes and heat levels are readily available. Quality is good.

### Red Bell Pepper

West: Red pepper is still the tightest colored pepper. Subpar quality coming from MX is causing a split market. Less expensive product may be very small in size and/or have poor quality. Look for relief in about 7-14 days as Canadian new crop brings more volume to the market.

### Yellow Bell Pepper

Production is light and is pushing the market higher. Quality is still very nice.

### Pineapple

The market is level; small pineapples are tight, but other sizes are in sufficient supply. Quality is good: fruit is juicy and tangy-sweet. Sugar levels are high, ranging from 13 to 16 Brix.

### Idaho Potatoes

Demand has increased across the board and all pricing is starting to increase. We expect to see pricing get stronger in April. Some of the Burbank crop appears to be rougher which has put some pressure on the Norkotah crop. Most growers are still running Norkotahs and Burbanks, and we will see the Norkotah supply last until the end of April to early part of May.

### Radishes

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

### Salad Blends

The market is steady; iceberg and romaine stocks are adequate. Quality is average: growers must harvest more fields to meet volume requirements; erratic weather is causing epidermal blistering and peeling that reduces head weights.

### Snow and Sugar Snap Peas

Snow and sugar snap peas supplies are steady through Miami.



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## Produce *(continued)*

### Spinach (Bunched)

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

### Spinach (Baby)

Baby and clipped spinach supplies are good and showing some quality issues due to colder weather.

### Spring Mix

Supplies are available. Quality is fair due to weather.

### Yellow Squash / Zucchini

East: FL new crop has officially begun, bringing a big sigh of relief to the much needed tight market. Although volume hasn't completely rebounded, supply is looking much better. We are seeing a better quality product as well. FOBs have collapsed and dropped drastically.

West: Hermosillo is moving full steam ahead with decent volume. Quality is improving and volumes are expected to continue to improve. FOBs have collapsed and dropped drastically.

### Tomatoes

#### East Rounds

Light volume is still coming from our FL farms as the winter crop comes to a close. Spring crop is still on the cusp of harvest due to recent cooler temperatures slowing down plant maturity. However, supply is expected to ramp back up by the end of next week. Until then, we are still seeing upward pressure on pricing. XL are staying the same price, but LG & MD are pushing up. XL are now the most available size while LG & MD are less available. Quality is excellent.

#### Romas

Romas demand was a little sluggish the last week, and more fruit is crossing from MX. Thus, FL prices are just slight down. Spring crop is just around the corner, delayed a bit due to cooler weather. Quality is excellent.

#### Grapes

Another week of light plantings as the farm awaits the spring crop to reach maturity. However, there is still a fair amount of supply, keeping prices steady moving into next week. Spring crop is expected to start either next week or the first week of April. Quality is excellent.

#### Cherries

Steady above average demand as well as light volumes are keeping market prices fairly stable. Look for prices to ease off in about 7 days once spring crop begins. Quality is excellent.

### West/Mexico Rounds

With cooler temps sweeping through the region, plant maturity has slowed and volumes are fairly light this week. Older fields are wrapping up as well keeping FOBs relatively high. However, supply will start improving progressively over the next 2-3 weeks as new crop/fields begin in Jalisco and Sonora. XL rounds are in better supply while LG & MD are snuggler. Quality is excellent.

### Romas

Roma supply has improved as demand has tapered off just a bit. Overall harvest volume is still lower than the average, but a fair amount of supply is crossing. FOBs are starting to fall. Quality is excellent.

### Grapes

Supply has loosened up bringing FOBs down quite a few dollars. However, there are reports of quality being hit and miss so beware of that "really good deal".

### Cherries

Although supply is light, demand is somewhat lackluster, keeping cherries relatively low in comparison to grapes. FOBs are steady. Quality is excellent.

### Watermelons

The market is slightly higher than last week, despite abundant stocks. Quality is best in Guatemala: issues like odd shape, thick green/ white rinds, and under-ripeness are expected at this time of the year. Sugar levels are starting to rise.

