



MARKET TRENDS

FOR WEEK ENDING JANUARY 11, 2019

 **PERFORMANCE**
FOODSERVICE



MARKET TRENDS

JANUARY 11, 2019

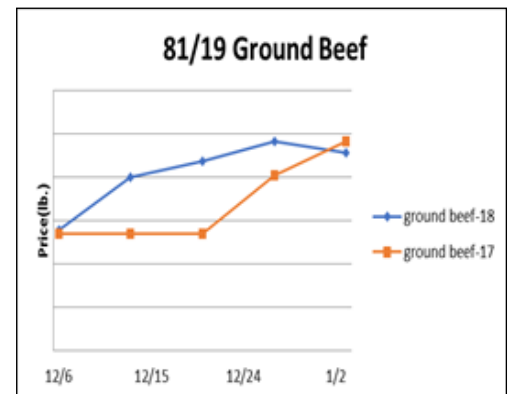
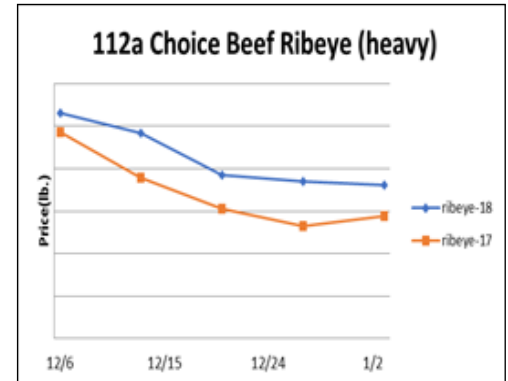
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Beef, Veal & Lamb

Prior to the Christmas-week slowdown, beef production exceeded expectations coming in at an estimated 7.1% over the year prior; With both Christmas Eve and Christmas Day falling on weekdays this year, Christmas week beef production was light, down 12% year-over-year. December's Cattle on Feed report confirmed expectations for smaller placements vs. 2017. With fewer cattle entering feedlots throughout the fall, expectations remain for tighter inventories of market ready cattle heading into late Q1 and extending into Q2. Beef demand was fantastic throughout 2018 and, if movement remains as brisk into 2019, risk to the wholesale beef cutouts will be to the upside this winter.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Lower
Feeder Cattle Index (CME)	Decreasing	Short	Lower
Ground Beef 81/19	Decreasing	Good	Lower
Ground Chuck	Increasing	Good	Higher
109 Export Rib (ch)	Decreasing	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)	Decreasing	Good	Lower
116 Chuck (sel)	Increasing	Good	Higher
116 Chuck (ch)	Increasing	Good	Higher
116b Chuck Tender (ch)	Increasing	Good	Lower
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Increasing	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)	Increasing	Good	Lower
168 Inside Round (ch)	Increasing	Good	Higher
169 Top Round (ch)	Increasing	Good	Higher
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	Lower
180 0x1 Strip (pr)	Decreasing	Good	Lower
184 Top Butt, boneless (ch)	Decreasing	Good	Higher
184 Top Butt, boneless (pr)	Decreasing	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Higher
185a Sirloin Flap (ch)	Decreasing	Good	Higher
185c Loin, Tri-Tip (ch)	Decreasing	Good	Lower
189a Tender (sel, 5 lb & up)	Decreasing	Good	Higher
189a Tender (ch, 5 lb & up)	Decreasing	Good	Higher
189a Tender (pr, heavy)	Decreasing	Good	Lower
193 Flank Steak (ch)	Increasing	Good	Higher
50% Trimmings	Decreasing	Good	Lower
65% Trimmings	Increasing	Good	Higher
75% Trimmings	Steady	Good	Lower
85% Trimmings	Increasing	Short	Lower
90% Trimmings	Increasing	Short	Lower
90% Imported Beef (frz)	Increasing	Good	Lower
95% Imported Beef (frz)	Increasing	Good	Lower
Veal Rack (Hotel 7 rib)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Lower



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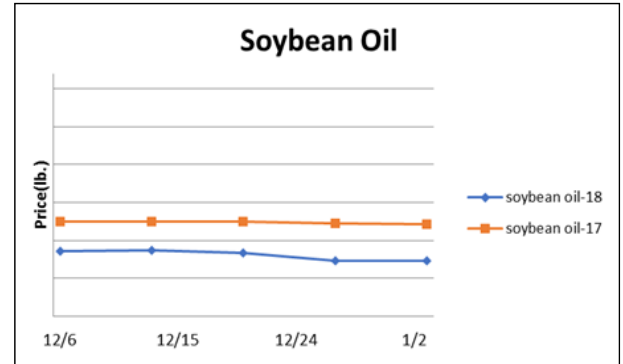
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Grains

In December, nearby corn futures hit the highest level since June but have retreated in the last two weeks. Although current U.S. corn supplies are adequate, there is growing consensus that the USDA may cut their future corn production forecasts. Since 2014, nearby corn futures have averaged up 3.7% over the next six weeks.

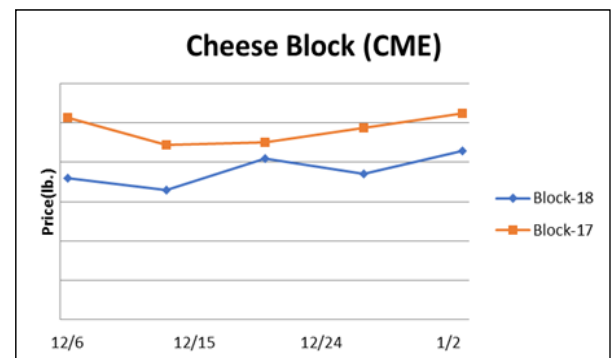
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Steady	Good	Lower
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher
Distillers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



Dairy

The cheese and butter markets found modest support over the last week. According to the USDA, November milk production was up .6% year-over-year despite the milk cow herd being down .4% from 2017. The milk per cow yield was up 1% year-over-year. Dairy cows were reduced by 8k head during the month making it the smallest herd since February 2017. For the six months period ending in November, the net herd reduction was 44k head, the biggest net loss for any six-month period since November 2012. Typically cheese and butter prices increase from now through early February.

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



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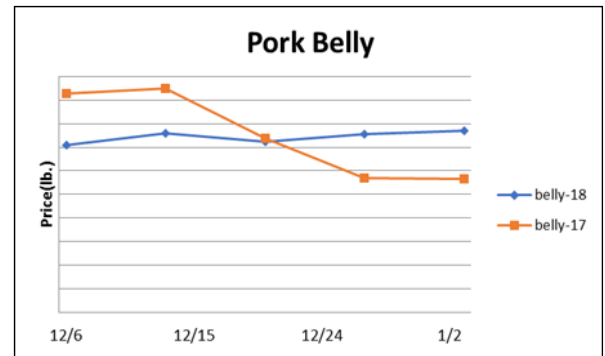
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Pork

Pork production for the last week of 2018 fell near 10%, year-over-year, but total yearly production was up an estimated 2.6% vs. 2017. While hams and loins have certainly weighed heavy on the wholesale USDA pork cutout, spot pork belly prices caught a late-year uptrend, closing out 13% higher (yoy). The December Hogs and Pigs report confirmed expectations of expansion into 2019, with Dec 1st market hog inventories the largest on record for the month. With pork output forecast 3.1% higher in Q1 (yoy), pork prices will likely remain under pressure.

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



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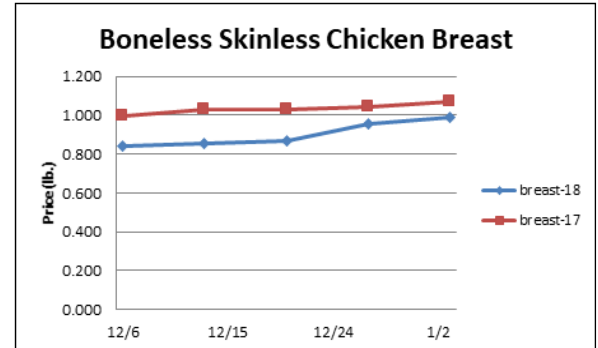
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Poultry

Following eight straight weeks of steady-to-lower year-over-year chicken slaughter, production jumped 1.5% (yoy) for the week ending December 22nd. Considerably lighter bird weights weighed on ready-to-cook production, dragging output down near 2017 levels. Heading into 2019, chicken production is forecast to expand further, but the rate of growth is expected to slow as dwindling integrator margins have left chick placement rather muted throughout the tail-end of 2018. With the government shutdown still in place, the USDA, NASS data used to calculate chick placements is unavailable, but preliminary data hints that January production may be down 3%. Wholesale chicken prices may find support amid smaller output.

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



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



Eggs

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

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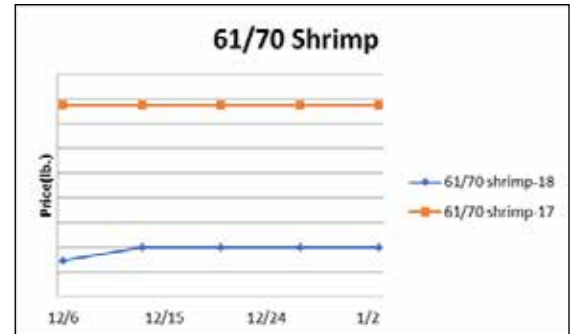
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Seafood

Shrimp prices remain below year ago levels. This, despite solid global demand. U.S. shrimp imports are anticipated to be strong due mostly to the inflated U.S. dollar value which should encourage supplies from abroad. That said, modest price increases for the various regional shrimp markets are projected for 2019. Snow crab prices usually soften this month and next.

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	Lower
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	Higher



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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	Nov-18	Oct-18	Sep-18
Beef and Veal	Increasing	Decreasing	Decreasing
Dairy	Decreasing	Decreasing	Increasing
Pork	Decreasing	Decreasing	Decreasing
Chicken	Decreasing	Increasing	Decreasing
Fresh Fish and Seafood	Increasing	Decreasing	Decreasing
Fresh Fruits and Vegetables	Decreasing	Decreasing	Increasing

Various Markets

Nearby Arabica coffee futures have appreciated during the last two weeks after revisiting the multi-year low of \$.935 last month. A relatively soft Brazilian real currency continues to boost global coffee exports. Still, Arabica coffee futures haven't priced notably below \$1.00 per pound since 2005.

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



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Produce

Market Overview

Most commodities have improved. We are still seeing supply issues with red cabbage and celery. Please be aware that we are experiencing winter weather related issues (snow and ice) in our growing regions which is delaying trucks and harvesting.

Today's Lettuce harvest was delayed until noon to 1 pm, and more lettuce-ice is forecast for tomorrow morning. Broccoli and cauliflower supplies appear to be genuinely limited and prices will continue to rise into early next week. There are adequate supplies of lettuce and leaf in the fields, however, a noon start and a 5:45 pm sunset result in shortened harvesting hours. Put another way, there are not enough daylight hours for crews to harvest enough product to meet demand.

An approaching wet weather system will bring much needed cloud cover to the desert beginning tomorrow night. Overnight low temperatures are expected to be above freezing the mornings of Saturday, January 5 through Wednesday, January 9.

Receivers and customers should expect Iceberg lettuce and leaf items to arrive with visible signs of exposure to freezing overnight temperatures... epidermal peel, discoloration, lighter weights and pale color.

Lettuce and leaf shippers will be packing in their labels over the next several days. Not much Peak at this point and probably for the rest of the Yuma season.

WATCH LIST

- Mixed Chili Pepper (Anaheim, Poblano, Serrano)
- Red and Green Bell Peppers -West
- Sweet Potatoes and Yams
- Squash- Green and Yellow -West

Apples & Pears

The market is steady; storage stocks are ample. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 14 to 18 Brix.

The Pear market is steady. Washington Bartlett and D'Anjou Pears will be available through January; 70- through 90-count sizes are scarce. Sugar levels range from 12 to 14 Brix.

Artichokes

Supplies industry wide are fair. Most of our volume this week is estimated to be 12's, followed by 24's. Demand is good, especially for 12's, 18's, and 24's. Prices are steady.

Arugula

Supplies and quality are both good.

Asparagus

Prices will start to inch down as January progresses and supplies increase in both regions. Mexican quality is best: spears are deep green and tips are compact..

MARKET ALERT

- **Asparagus - ESCALATED**
- **Cabbage (Green & Red) - ESCALATED**
- **Celery - EXTREME**
- **Jalapenos - ACT OF GOD**
- **Mushrooms - ESCALATED**
- **Tomatoes (Rounds & Romas) - ESCALATED**



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Produce (continued)

Avocados

Fresh fruit vs old fruit is causing a 2-tiered market. Supplies continue to be strong and Mexico is picking heavy to make up for the time they stopped. Price points are low enough that many retailers are beginning promotions again, which should start to help with demand. #2 fruit should be readily available going forward to cover any and all foodservice needs. Barring any labor issues in MX, going forward there should be ample supplies available.

Bananas

Bananas are showing high quality and supplies are good and should remain steady for the first part of the year.

Beans

Green beans are readily available in both Eastern and Western markets this week and quality is nice. Mainland Mexico's steady supply may encounter a hiccup next week as crops react to this weekend's cold weather.

Berries:

Blackberries

Prices are climbing; cold weather is reducing berry growth in Mexico. Quality is good: berries are juicy and sweet, but small in size due to low temperatures. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is elevated. Low temperatures are reducing supplies in Mexico; offshore stocks are also tight. Quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

The market remains elevated; cold weather is impeding growth. Quality is average: sugar levels range from 13 to 14 Brix.

Strawberries

Prices are elevated. Cold weather is decreasing volume in the growing regions of California, Florida, and Mexico. Quality is good: bleeding, bruising, and shortened shelf-life are problems.

Bok Choy

Supplies and quality are good.

Broccoli

Prices are climbing; cold weather is inhibiting growth. Hollow core and pin rot are industry-wide issues, but production crews are culling affected heads at the field level.

Brussels Sprouts

Brussels sprout supplies are good. This market has improved.

Cantaloupe

We are done here in the Arizona and California deserts, and have started receiving some light volumes here on the west coast and volumes will start to increase each week going forward. The east coast has better volumes than we do here on the west but still a pretty strong Market. The overall quality is good, with a green cast and very firm fruit, the brix is around 12 but eat a little flat. Interior color is good to fair, but as we progress through the month, we will see better eating fruit.

Carrots

Quality is excellent. Supplies and market are steady.

Cauliflower

Prices have jumped; supplies are tightening due to low temperatures. Quality is average: discoloration and uneven size are occasional problems.

Celery

Expect high markets through January; stocks are scarce. A disease called Fusarium is limiting supplies this year; pith and growth cracking are minor issues.



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Produce (continued)

Cilantro

Supplies and quality are both good.

Corn

Steady supply and good quality out of Florida.

Cucumbers

EAST: FL production is still slow and low. Honduras offshore season continues to increase volumes weekly. FOBs are steady. Quality from FL is a little struggle while offshore is looking nice.

WEST: Great quality and supply is crossing daily. FOBs are steady dollars and quality is excellent.

Eggplant

EAST: Supply is readily available from multiple areas in FL such as Plant City, Homestead & Estero. FOBs are weak with excellent quality available.

WEST: No shortage of eggs in the west. FOBs are weak with excellent quality available.

Fennel

Quality is good with great availability.

Garlic

The market is about 50% done with the 2017 crop. Supplies are steady, and prices remain high on domestic product.

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

The market is rising; storage stocks are nearly depleted. Green seedless sugar levels range from 17 to 18 Brix; portion-packed sugars vary from 18 to 20 Brix. Some offshore grapes are starting to trickle in.

Green Cabbage

ESCALATED Due to the cold weather, there will be lighter supplies for the next two weeks

Red Cabbage

ESCALATED Supplies are lower than normal and prices are rising.

Green Onions

The market is extremely active. Labor is short, and the cold weather is reducing how fast crews can harvest. We will continue to see demand exceed supply through next week.

Honeydew

Market strong as well as Mexico is our main source of volume, we will see some of the Guatemalan fruit coming in about a week, we anticipate the market to keep strong. The overall quality of the fruit is fair to good with some of the weather causing some discoloration and heavy scarring, the fruit has gone through some tough weather and it shows.

Jicama

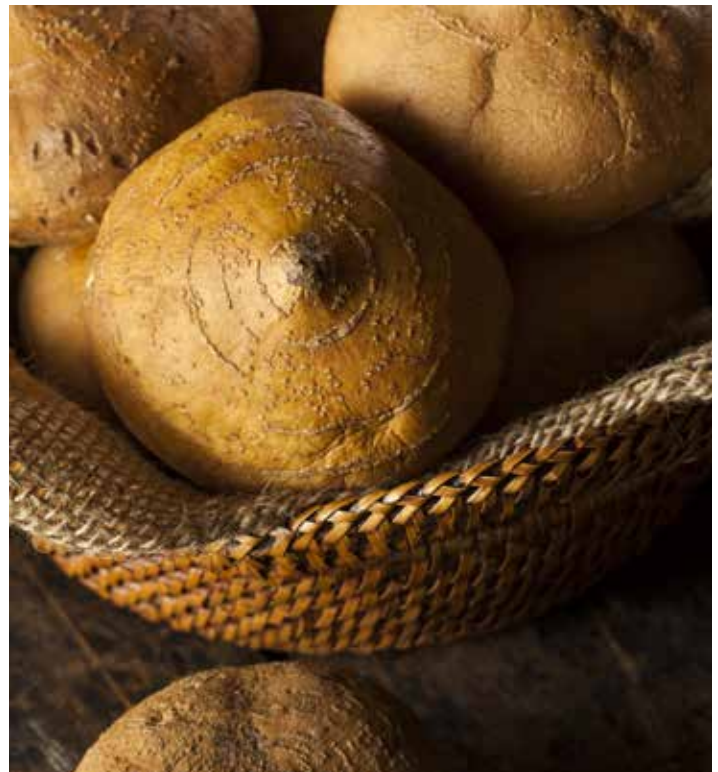
Markets remain firm due to ongoing short supplies and will continue to see some quality and shelf life issues.

Kale (green)

Quality is fair, due to some product having mild mildew. Supplies are fair.

Lemons

Market is steady, as we are going out of Dist. 3 and also here in Dist. 1, This year's crop out of dist. 1 will take us into May, and the crop volume is of normal size and should have a decent run of size. The dist. 3 fruit is being gassed and seeing some spotting and green tinge around the stem and blossom end, but fruit is firm and juice content if fair to good. We will be finishing Dist. 3 around the end of January; the overall quality is good and will continue to get better as our color gets better in the field and we are gassing less hours.



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Produce (continued)

Lettuce:

Butter

The market has improved and remains steady. Quality is good.

Green/Red Leaf

Supplies are fair, due to cold weather impacting our ability to quickly harvest.

Iceberg Lettuce

Supplies are slightly better than the last few weeks. Due to the cold weather, harvesting has been very limited and there is a possibility that there could be varying degrees of blister, epidermal peel and burn. Lack of supplies could cause the market to be higher.

Romaine

Harvesting has been on the slower side, due to the cold weather. In addition, there could be varying degrees of blister, epidermal peel, and burn.

Romaine Hearts

Due to past and continuing episodes of freezing in the growing areas there could be varying degrees of blister, epidermal peel, and burn.

Limes

Prices are stable; 175-count and smaller sizes are tight. Quality is good: scarring is minimal.

Napa

Demand, supply, and quality are all good.

Onions

The market is up; production has been limited the past few weeks due to the holiday season. Quality is excellent.

Oranges

We are going full swing on the 2018/2019 California navel crop and will continue with navels through April, the overall crop volume is up about 20% with this being said we will have good supplies of 88's-138's through the season. The larger size fruit will be on the tighter side, for the through the first of the year, we had some rain Yesterday and are expecting some more over the weekend, so we will pray that is the case. This will help size up the fruit, and sugars continue to get better which have been around 12 brix, so fruit does eat good and will only get better in the coming weeks. Also, the navels are being gassed about 24-48- hours to bring on the color, you will see some green tinge and some spotting due to the gassing here and there but nothing overwhelming. We anticipate a good quality year on navels going forward.

Parsley(Curly, Italian)

Supplies and quality are both good.



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Produce (continued)

Green Bell Pepper

EAST: Supply continues to be light from FL. Plant City is winding down and South FL can't get the necessary traction to bring price relief. Thus FOBs are mostly steady. Sizing is running on the big side with limited choice pepper available. Quality is mostly good.

WEST: Mainland MX's volume has stalled with cooler weather and cloudy days. FOBs are steady. Quality is hit and miss.

Jalapeños (Chiles)

EAST: There is still a shortage of supply in the east with FL farms producing far less than what is demanded. FOBs remain high and quality is only fair to good.

WEST: Growers are still trying to recover from prior weather events. It will be late January before we see any relief. FOBs remain high, but steady. Quality is fair to good.

Red and Yellow Bell Pepper

The market is high. Supplies will remain extremely limited until mid-January when the Mexican season ramps up. Quality is fair: scarring is a problem.

Pineapple

Prices are high; volume is low in Costa Rica and Mexico (into Texas). Quality is average: fruit is firm, yet juicy, with sweet, slightly tangy flavor. Sugar levels vary from 13 to 16 Brix.

Idaho Potatoes

Prices are climbing. Cold weather is forecast for this week. Temperatures must be 18 degrees or higher to haul potatoes from cellars to packing sheds. These conditions may affect the number of potatoes packed and delay loading. Burbanks are commanding premium prices.

Radishes

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

Salad Blends

The market is unchanged; raw product supplies are sufficient, yet cold weather and ice may reduce yields this week. Inspectors are closely monitoring finished packs for chunks and core material to achieve the best mix.

Snow and Sugar Snap Peas

Quality is excellent. Supplies and market are steady.

Spinach (Bunched)

Supplies and quality are both good.

Spinach (Baby)

Supplies and quality are both good.

Spring Mix

Prices are starting to rise; if low temperatures and ice persist, volume will fall. Quality is average.



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Produce (continued)

Sweet Potatoes and Yams

WATCH LIST This market has spiked due to heavy damage in the Carolinas.

Yellow Squash/Zucchini

EAST: Both are readily available, but good quality demands a firm FOB. There is a significant amount of both yellow and green squash available at low prices.

WEST: Both yellow and green squash are readily available. FOBs are steady week over week. Quality overall is mostly good.

TOMATOES EAST

Rounds

ESCALATED - The Florida market remains firm on premium sized fruit. The harvest is heavy on medium and small sizes. Quality is being reported as fair to good, which could draw a price difference.

Romas

ESCALATED Prices remain firm on larger sized fruit out of the east and Mexico. The Florida supply is tight due to plant acreage while supplies are ramping up out of Mexico. We should see the markets begin to improve on premium sized fruit by the second week of January.

Grapes: Grape tomato prices continue to drop this week and is showing increased supplies.

Grapes

Grape tomato prices continue to drop this week and is showing increased supplies. Current demand is low to moderate, which is giving farmers time to catch up on supplies. Price changes will vary from bulk to pints.

Cherries

Cherry tomato prices are mixed this week. The East is reporting a slight drop in price this week, due to weak demand. Quality is trending between fair to good for the week.

Organic Tomatoes

Supplies are tight, and demand exceeds supply due to the overall condition on the tomato category. We expect conditions to improve in 7 to 10 days.

TOMATOES WEST

Rounds

ESCALATED Rounds remain firm this week and fobs are mostly unchanged. 2-layer vines are tight and shippers are struggling with color. We expect markets to improve by mid-month.

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Cherries

Cherry tomato prices are mixed this week. The West is steady to high, due to lack of supply. Quality is trending between fair to good for the week.

Watermelons

Prices are steady at high levels; Mexican growers have transitioned to Southern Mexico, increasing freight costs to the U.S. Overall availability is below normal. Quality is good; sugar levels range from 12 to 13 Brix.

