



MARKET TRENDS

FOR WEEK ENDING JANUARY 18, 2019



MARKET TRENDS

JANUARY 18, 2019

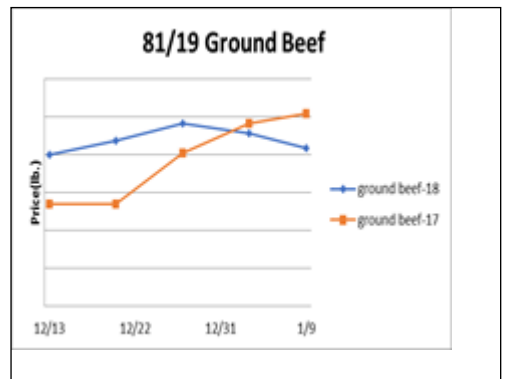
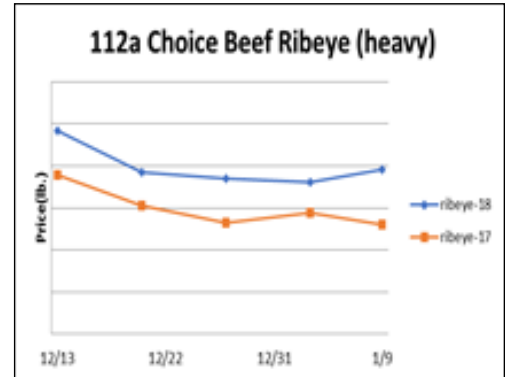
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Last week's cattle harvest came in at 520k, up from the Christmas shortened prior week, but was 4.6% below the same week last year. With impressive forward sales on the books, beef packers are expected to boost production. But beef prices should remain supported as deliveries are carried out on existing sales. Typically, beef demand wanes in Jan/Feb, but last year ended strong which hints that an upside price risk may still occur. Choice ribeyes have fallen 13% from their December peak but are still above year ago levels. The 50% beef trim market has fallen, and, given lighter carcass weights and easing fed cattle numbers this winter, this year's typical seasonal advances may be more intense.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Increasing	Short	Lower
Ground Beef 81/19	Decreasing	Good	Lower
Ground Chuck	Decreasing	Good	Lower
109 Export Rib (ch)	Decreasing	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)	Decreasing	Good	Lower
116 Chuck (sel)	Decreasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Higher
116b Chuck Tender (ch)	Decreasing	Good	Lower
120 Brisket (ch)	Decreasing	Good	Lower
120a Brisket (ch)	Decreasing	Good	Lower
121c Outside Skirt (ch/sel)	Increasing	Good	Higher
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Increasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Lower
168 Inside Round (ch)	Decreasing	Good	Lower
169 Top Round (ch)	Decreasing	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)	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)	Decreasing	Good	Lower
185a Sirloin Flap (ch)	Decreasing	Good	Lower
185c Loin, Tri-Tip (ch)	Increasing	Good	Higher
189a Tender (sel, 5 lb & up)	Increasing	Good	Higher
189a Tender (ch, 5 lb & up)	Increasing	Good	Higher
189a Tender (pr, heavy)	Increasing	Good	Lower
193 Flank Steak (ch)	Decreasing	Good	Higher
50% Trimmings	Increasing	Good	Lower
65% Trimmings	Increasing	Good	Lower
75% Trimmings	Decreasing	Good	Lower
85% Trimmings	Decreasing	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)	Increasing	Good	Lower



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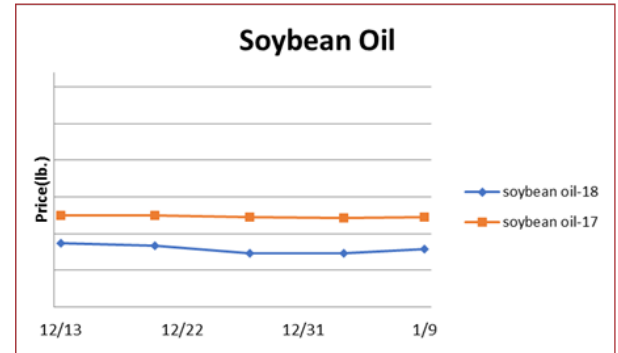
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Grains

The grain markets have remained relatively range-bound during the last several weeks but at historically attractive levels. China-U.S. trade talks are progressing, and China has recently imported more U.S. soybeans. Still, the burdensome U.S. soybean supply is likely to temper any upside price potential this winter.

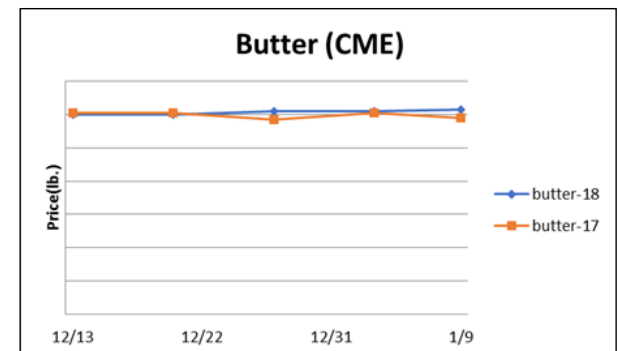
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Steady	Good	Higher
Distillers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



Dairy

The cheese markets have softened over the last week and remain historically low. Per the USDA, November 30th cheese stocks were up 7% (yoy) and a record for the month. But, the drawdown in November was the best in five years, a sign of better demand. The downside risk for cheese prices from here is limited. Butter prices have risen modestly as of late. November 30th butter stocks were down 3% (yoy) and the smallest for the date since 2015. The monthly drawdown was a record for the month. Since 2015, the average move for spot butter prices in the next four weeks was up 5.4%.

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



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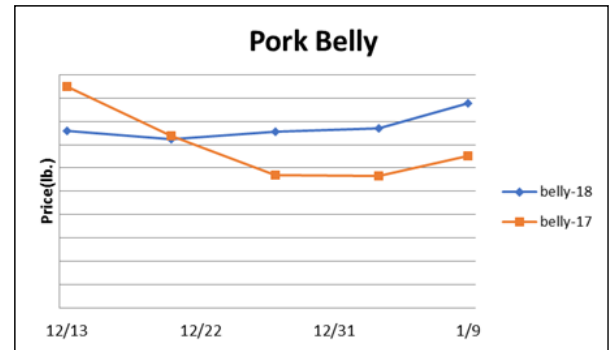
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Pork

Weekly pork production for the first week of the new year jumped 6.3% from a year ago. Pork production is projected to be large this year and the USDA pork cutout value may struggle as a result. Currently, the USDA pork cutout is the lowest since 2016 with a few record low prices on many of the primals. The one exception is the pork belly cutout which is up 11% (yoy). From here, it may be tough for belly prices to continue to rise as buyers could become more cautious.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Increasing	Ample	Lower
Sow	Decreasing	Ample	Lower
Belly (bacon)	Increasing	Good	Higher
Sparerib(4.25 lb & down)	Increasing	Good	Lower
Ham (20-23 lb)	Decreasing	Good	Lower
Ham (23-27 lb)	Increasing	Good	Lower
Loin (bone in)	Decreasing	Good	Lower
Babyback Rib (1.75 lb & up)	Decreasing	Good	Higher
Tenderloin (1.25 lb)	Increasing	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	Lower
72% Trimmings	Increasing	Good	Higher



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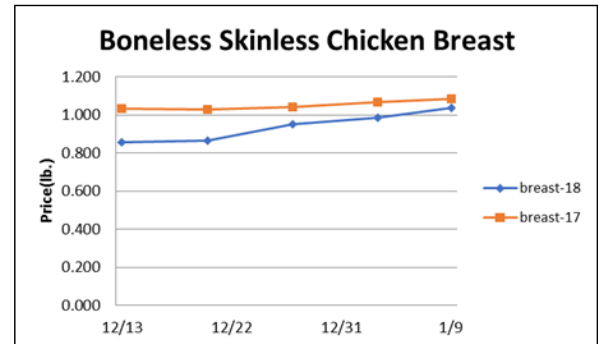
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Poultry

During the last week of 2018, chicken production fell 14% (yoy) and the six-week average was down 3.1%. USDA-NASS reporting remains closed, limiting available data to provide more robust estimates on forward broiler production. Still, forecasts call for chicken output to be modest into late winter. The lighter production schedules have boosted chicken prices, breaking out of the historically low trading ranges we've seen since early fall. Chicken breast values have achieved the highest level since August. The ArrowStream Chicken Wing Index is currently the most expensive in almost a year. Further price support for chicken is likely this winter despite big cold storage inventories.

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	Lower
Breast Boneless Index (ARA)	Increasing	Good	Lower
Tenderloin Index (ARA)	Increasing	Good	Higher
Legs (whole)	Increasing	Good	Higher
Leg Quarter Index (ARA)	Increasing	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)	Increasing	Good	Higher
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)	Decreasing	Short	Lower
Liquid Whole Eggs	Decreasing	Short	Lower
Liquid Egg Whites	Increasing	Short	Higher
Liquid Egg Yolks	Steady	Short	Lower
Egg Breaker Stock Central	Steady	Short	Lower

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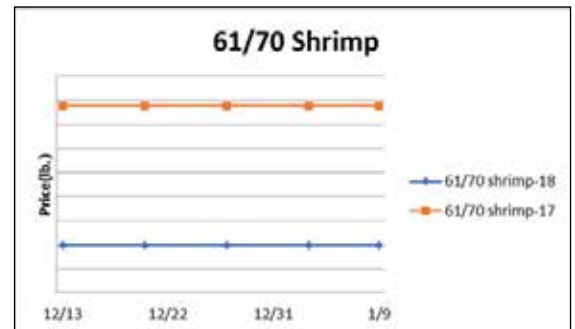
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Seafood

The salmon markets are tracking near year ago levels despite solid imports this past fall. The U.S. is estimated to have imported nearly 8% more shrimp than the previous year during the last few months. October imports were up 8.6%. If the inflated dollar value persists, it should encourage imports during the winter and mitigate the upside in the salmon markets.

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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PERFORMANCE
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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 international sugar (#11) futures have risen during the last week after pricing at the lowest level since November. Although global sugar supplies appear to be adequate, there are El Nino weather concerns for the upcoming sugar plants in Brazil. Nearby sugar futures could hit resistance at \$.134.

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



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Produce

Market Overview

Please be aware that we are experiencing winter weather related issues (snow and ice) in our growing regions which has caused some quality issues with a lot of commodities. Jalapenos are still in an Act of God.

WATCH LIST

- Carrots
- Limes
- Mixed Chili Pepper (Anaheim, Poblano, Serrano)
- Red and Green Bell Peppers -West
- Sweet Potatoes and Yams
- Squash- Zucchini
- Sugar Snap Peas

Apples & Pears

Apple prices are mostly unchanged; storage supplies are plentiful. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 14 to 18 Brix.

Pear prices are stable. Washington Bartlett Pears will be available through mid-February; 70- through 90-count sizes are scarce. Sugar levels range from 12 to 14 Brix.

Artichokes

Supply industry wide is fair. Most of our volume this week is estimated to be 18s, followed by 12s. We're packing Angelina label due to frost damage. Demand is good, especially for 12s, 18s, and 24s. Prices are steady on most sizes.

Arugula

Supplies are good. There could be some quality issues, due to cold weather.

Asparagus

EXTREME We are experiencing a very extreme market on asparagus. We are currently transitioning from Peru to Mexico, Peru shut down production early due to extremely low demand and in the anticipation that Mexico would be starting. The Mexican market has been hit with very cold weather which has slowed down production, additionally, the warmer weather we saw previously came very early which caused many fields to have premature flowering causing a lower yield than anticipated.

Avocados

Markets are better coming out of the holidays. Slow picking in MX kept supplies reasonable and allowed the border and destination to clean up with new fruit. The focus now turns to Super Bowl and markets will go up some. Fruit is getting picked at higher elevation, which is cleaner than the lower elevation and has cut back on some of the excessive #2's that were getting sent to the US. Demand continues to be good with many promotions planned for January and pull from food service increases as many people start their New Year's diets.

MARKET ALERT

- **Asparagus - EXTREME**
- **Broccoli - ESCALATED**
- **Cabbage (Green & Red) - ESCALATED**
- **Cauliflower - ESCALATED**
- **Celery - EXTREME**
- **Green Onions - ESCALATED**
- **Jalapenos - ACT OF GOD**
- **Mushrooms - ESCALATED**
- **Tomatoes (Rounds) - ESCALATED**
- **Yellow Squash - EXTREME**



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Produce *(continued)*

Bananas

Bananas are showing high quality and unlike the 1st part of last year, supplies are good and should remain steady.

Beans

EAST: Round beans are readily available with excellent quality available.

WEST: Things are just a hair tighter with the cooler weather, but coupled with weak demand, there are still a good amount of bean around with great pricing. Quality is mostly good.

Berries:

Blackberries

The market is climbing; low temperatures are reducing volume in Mexico. Quality is average: berries are juicy and sweet, but small in size due to winter weather. Sugar levels range from 12 to 13 Brix.

Blueberries

Prices are up. Freezing temperatures are impeding growth in Mexico; offshore supplies are also limited. Quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

Prices are high; low temperatures are reducing volume. Quality is good, but berry size is below-normal due to the cold. Sugar levels range from 13 to 14 Brix.

Strawberries

The market will remain elevated for approximately three more weeks. Heavy rain in Oxnard, California delayed harvesting, limiting supplies. Quality is average: bleeding, bruising, and shortened shelf-life are problems.

Bok Choy

Supplies and quality are good.

Broccoli

The market is holding steady at high levels; yields are beginning to increase. Hollow core and pin rot are industry-wide problems, but production crews are culling affected heads at the field level.

Brussels Sprouts

Brussels sprout supplies are good. This market has improved.

Cantaloupe

Offshore fruit to the west has been minimal with the heavier volumes landing on the east coast. Therefore, the west coast has been much stronger than the east coast prices. The overall quality is fair to good with a firm green cast and sugars are on the minimal side as well. They are experiencing a white fly problem in Guatemala which basically chokes the plant therefore not all the nutrients are getting to the melon and hence the eating quality and also the strength of the fruit.

Carrots

WATCHLIST: The harvest in our current region is showing lower yields and smaller sizing, we are seeing shorter supplies and prices are higher.

Cauliflower

The market remains high; desert stocks are tight due to cold weather. Quality is good: discoloration and uneven size are issues.

Celery

Prices are up; supplies are limited. Quality is fair: pith and growth cracking are minor issues.

Cilantro

Supplies and quality are both good.

Corn

Steady supply and good quality out of Florida.



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Produce (continued)

Cucumbers

EAST: FL production should be done by end of this week, possibly might roll a little into next. This leaves Honduras as the main source. Production has been solid offshore with all major players in the mix. With FL out of the picture, FOBs are feeling upward pressure. Offshore quality has been mostly good, but there are occasional reports of shrivel and scarring. 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: MX's cucumber crop suffered as well from the cold snap. Quality up until now has been strong, but we could see some issues over the next few weeks. FOBs are feeling upward pressure but should bounce back in the next 10-14 days as decent weather is on the horizon.

Fennel

Quality is good with great availability.

Garlic

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 Chilean grape deal is very tight especially here on the west coast, as the Chilean Ports were on strike and volumes are down from previous years at this time, the Long Beach Pier was also slow playing the unloading process. The Chilean volumes will start to increase next week but demand is very good with light supplies so probably by first of Feb. we should see the prices ease a bit and see better volumes. The overall crop volume out of Chile looks good and overall quality of the first arrivals has been good and we expect it to stay that way but will continue to monitor quality and keep you posted.

Green Cabbage

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

Green Onions

ESCALATED The market remains extremely active due to lack of volume crossing from Mexico over the last two weeks. Holidays and cold weather have reduced total volume by over 50%. This week, the market will remain snug. Although, we should see normal volume late this week or early next week.

Honeydew

We are going out of Mexico with very light volumes and fruit is extremely tight and limited, the Offshore Honeydews are also suffering from a white fly problem and volumes are lighter than normal and also the fruit quality has been rough with spotting and also weaker fruit due to the white fly problem.

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. Supply and demand are good.

Lemons

Market is steady, as we are going out of Dist. 3 and will be finishing in the next 2 weeks and going with good volume 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. The dist. 1 fruit is looking good having to gas some of the blocks for 24-48 hours, which will show some spotting and a tinge of Green. The colder nights we have been experiencing will help to color the fruit and keep it firm and strong. We expect good quality going forward barring any major weather changes.



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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

Last week, we experienced seven days of ice in our fields, which is causing epidermal peel. Our harvest crews will do their best to peel any visible cap leaves showing the effects of ice. As a result of this, we are seeing lighter weights and lower yields, especially at our processing plant. There is a chance of a very active market as a result from school starting up again.

Romaine

We are seeing some minor epidermal peel and blistering due to the cold weather in the Imperial Valley.

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

The market is up. Crossings from Mexico into the U.S. are down; stocks are tight. The crop is dominated by 110- to 150-count sizes. Quality is very good.

Napa

Demand, supply, and quality are all good.

Onions

Prices are rising. Production schedules were cut short over the holiday season, reducing volume. Expect high markets until Mexican- and Texas-grown stocks hit the market in late February and March.

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 January, we are expecting rain today and also first of next week. 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 hours at the most, you will see some green tinge and some spotting due to the gassing here and there but nothing overwhelming and some of the blocks are not being gassed at all. We expect the quality to stay good as we have had some cold nights in the high 20's low 30's which will help to keep fruit firm and strong.

Parsley(Curly, Italian)

Supplies and quality are both good.

Green Bell Pepper

EAST: FL's supply will continue to be light through the winter season as total acreage planted is down YOY. Majority of production is coming from south FL with a handful still coming from Plant City. Sizing is running to the XL/JBO size and very limited for LG/MD/CH. FOBs continue to creep up as demand exceeds supply. Quality has been just fair recently due to weather.

WEST: Mainland MX's supply was stunted due to colder temps and rain. Warmer weather is in the forecast which will help resume volume harvests. Quality as of today is not affected by weather, however, we do anticipate issues down the road, such as thinner walls and bruising. FOBs creep up as demand exceeds supply.



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Produce *(continued)*

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, even up another few dollars, and quality is only fair to good.

WEST: While MX's chili crop has been pampered, patiently waiting supply improvement, yet another cold front came through with freezing temperatures over some fields. This cold weather is going to continue to stunt growth through the rest of January, and now possibly even in to Feb. FOBs are up again. Quality is fair at best and we will likely see impacts down the road as well.

Red and Yellow Bell Pepper

EAST: A small amount of red pepper is coming in from offshore, but still not enough supply to meet demand. FOBs are very high and steady. Quality is fair to good with discoloration being the main concern. Good growing conditions are in place, so we are expecting things to turn around in the next few weeks.

WEST: MX has had light production. Between the cool temps, tough green pepper market, and shady skies, red pepper cannot catch a break. FOBs continue to be high with good quality reports.

Pineapple

The market is elevated; stocks are limited in Costa Rica and Mexico (into Texas). Quality is good: fruit is firm, yet juicy, with sweet, slightly tangy flavor. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

The market should stabilize by February. Freezing weather has reduced the number of potatoes packed and delayed loading. Temperatures must be 18 degrees or higher to haul potatoes from cellars to packing sheds. Demand is strongest for 70-count supplies; 80-count potatoes are most plentiful.

Radishes

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

Salad Blends

Prices are level. Inspectors are closely monitoring finished cartons for chunks and core material to achieve the highest quality packs.

Snow and Sugar Snap Peas

WATCHLIST Expect industry wide quality and availability issues due to freezing temps.

Spinach (Bunched)

Supplies are good. There could be some quality issues, due to cold weather.

Spinach (Baby)

Supplies are good. There could be some quality issues, due to cold weather

Spring Mix

The market is up; low temperatures and ice are limiting stocks. Quality is average.



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Produce (continued)

Yellow Squash/Zucchini

EAST: Although tonnage reported is decent, quality has been rough the last few weeks from FL's squash supply. Wind scars have been the biggest concern on both green and yellow. FOBs move up a few dollars to account for the lack of quality fruit.

WEST: Squash was greatly affected but the recent cold weather. Both yellow & green are very limited with FOBs jumping up significantly. Quality is affected as well and is fair at best. Best case scenario, markets will not improve until late January, even maybe into February.

TOMATOES EAST

Rounds

Acreage continues to be the conversation topic. There are only a handful of growers left in the region & those remaining are planting less total acreage due to the downward trend of field grown tomatoes. Palmetto/Ruskin has a handful left but nothing to write home about. Florida's production is now predominately from the southern region, Immokalee & Naples. With only steady, yet light volume harvesting from FL, FOBs are anxiously awaiting MX to ramp up (see western update). Until then, FL FOBs remain unchanged week over week. Expect a firm market until MX cranks up. Extra-large size is still the tightest available, large is somewhat available, and medium is more readily available. Quality from south FL is excellent.

Romas

Following the round trend, there is less acreage available this year versus years past. The season has moved south for the winter, to the Immokalee/Naples region. Supply is light but steady. The pressure continues to be on MX for relief. FOBs are moving up on all sizes. Quality is excellent.

Grapes

a handful of grapes is still coming from the Palmetto/Ruskin region, but look for majority of good quality production to come from South Florida. Supply has improved slightly week over week, putting some moderate downward pressure on FOBs.

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.

TOMATOES WEST

Rounds

Mexico's production was on the cusp of crop maturity, but the cold snap that came through the West MX & Mainland regions slowed growth cycles significantly. Warm weather is what is needed to help the fruit fully mature for harvest. The forecast looks like there is some improvement expected, which will help drive volume for the country and bring eastern FOBs down. Until then, expect these snug and high FOB markets. Looking into next week, there are limited mature greens and limited vine ripens crossing. Most western re-packers are using eastern fruit to fill their ripening rooms. Thus, FOBs are unchanged week over week and quality remains excellent.

Romas

The cold weather has stunted the growth cycle, putting upward pressure on markets. Supply continues to be snug from all major regions & crossing points. FOBs pushing upward for next week. However, with the warmer weather in the forecast, things could turn around quicker than rounds. Quality is excellent.

Grapes

Oddly enough, grapes in MX fared well with the colder temps. Supply seems to still be decent putting downward pressure on FOBs. However, the cold weather did affect quality and is creating a bit of a split market. The better-quality fruit is demanding a higher price point. With decent temps in the forecast, we should see quality improve rather quickly.

Cherries

Nogales has good numbers crossing. FOBs are mostly steady. Quality is excellent.

Watermelons

The market is high; Mexican growers have moved to Southern Mexico, increasing freight costs to the U.S. Availability is below normal. Quality is good: sugar levels range from 12 to 13 Brix.

