



MARKET TRENDS

FOR WEEK ENDING JANUARY 25, 2019



MARKET TRENDS

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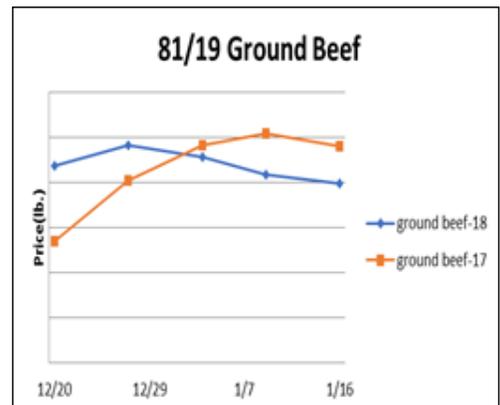
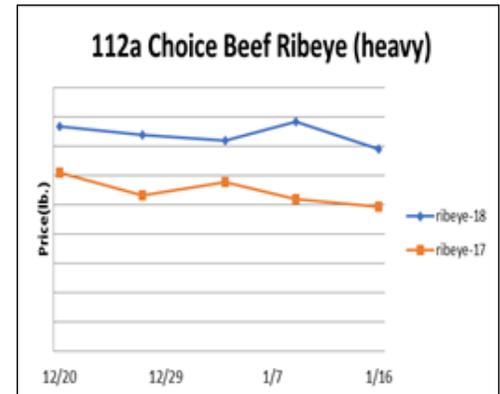
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Beef production in the first full week of 2019 got off to a brisk start, up 2.6% year-over-year. Estimated carcass weights were modestly higher than the year prior, boosting production, but winter weather is expected to temper feedlot performance heading into the weekend. Winter storms moving towards the Midwest and Plains are of particular interest, given the accelerated quality grading noted throughout 2018. Cattle in Kansas and Nebraska produce the largest percentages of Choice and Prime beef. While a modest seasonal move lower for the boxed beef cutouts would be typical into next month, the cutouts are likely to find counter seasonal support and choppiness on tighter supplies into late winter

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Decreasing	Short	Lower
Ground Beef 81/19	Decreasing	Good	Lower
Ground Chuck	Increasing	Good	Lower
109 Export Rib (ch)	Increasing	Good	Higher
109 Export Rib (pr)	Increasing	Good	Lower
112a Ribeye (ch)	Decreasing	Good	Higher
112a Ribeye (pr)	Decreasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Increasing	Good	Lower
116 Chuck (sel)	Decreasing	Good	Lower
116 Chuck (ch)	Decreasing	Good	Lower
116b Chuck Tender (ch)	Decreasing	Good	Lower
120 Brisket (ch)	Decreasing	Good	Higher
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	Decreasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Lower
168 Inside Round (ch)	Decreasing	Good	Higher
169 Top Round (ch)	Decreasing	Good	Higher
171b Outside Round (ch)	Decreasing	Good	Lower
174 Short Loin (ch 0x1)	Decreasing	Good	Higher
174 Short Loin (pr 2x3)	Decreasing	Good	Lower
180 0x1 Strip (ch)	Increasing	Good	Higher
180 0x1 Strip (pr)	Decreasing	Good	Lower
184 Top Butt, boneless (ch)	Decreasing	Good	Lower
184 Top Butt, boneless (pr)	Decreasing	Good	Higher
184-3 Top Butt, bnls (ch)	Decreasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Higher
185c Loin, Tri-Tip (ch)	Increasing	Good	Lower
189a Tender (sel, 5 lb & up)	Decreasing	Good	Higher
189a Tender (ch, 5 lb & up)	Increasing	Good	Higher
189a Tender (pr, heavy)	Increasing	Good	Lower
193 Flank Steak (ch)	Increasing	Good	Higher
50% Trimmings	Decreasing	Good	Lower
65% Trimmings	Increasing	Good	Lower
75% Trimmings	Increasing	Good	Lower
85% Trimmings	Increasing	Short	Lower
90% Trimmings	Increasing	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	Lower



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JANUARY 25, 2019

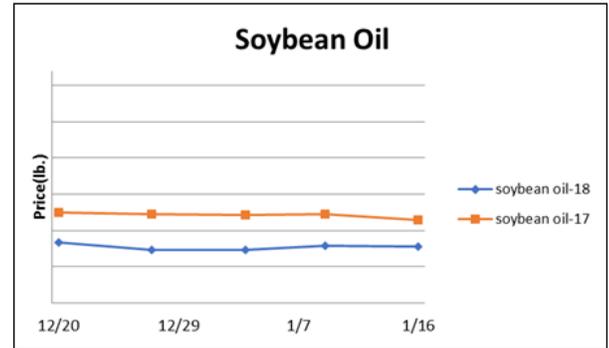
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Grains

Speculation is that China and the U.S. could announce a trade deal before April. However, the U.S. soybean supply could remain burdensome. Chinese soybean imports have been lackluster due in part to a decline in their feed demand. Fairly engaging soybean prices are anticipated to persist.

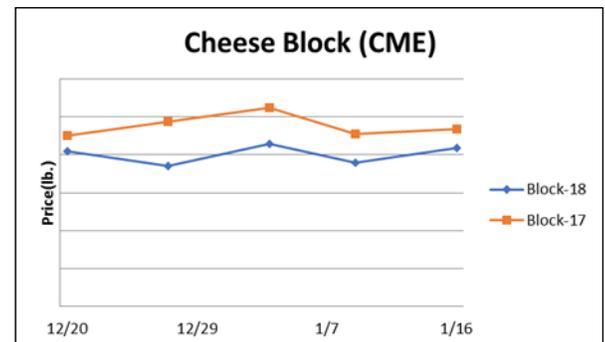
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Higher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



Dairy

The cheese block and barrel markets have softened so far this year. But, the average Class III milk futures for 2019 are currently pricing 5.2% above the average Class III milk futures which motivates milk supplies to butter production instead of cheese manufacturing. This factor suggests that the downside risk for cheese prices from here is limited, despite strong inventories. It also hints that in spite of solid butter demand, the butter market could seasonally top earlier than typical this winter. The quarterly pivot model hints that butter prices may visit \$2.150 and \$2.080 before April.

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



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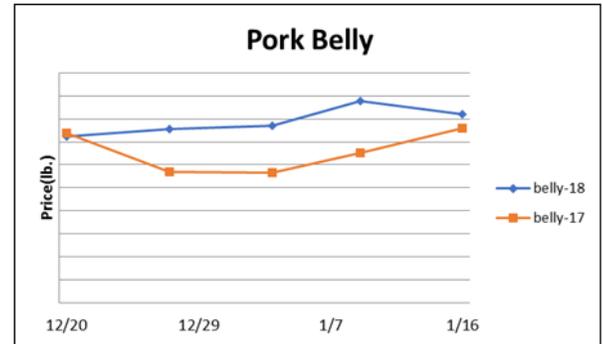
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FOODSERVICE



Pork

Last week pork production was up 4.6% from last year and output schedules appear to be running at full tilt. Accelerated production has taken its toll on many of the pork markets, with hams and loins at multi-year lows. Only the pork belly primal has displayed notable year-over-year strength and has increased 22% from the late December low. However, belly prices have just established a top and are now falling significantly. The USDA pork cutout weakness may continue in the near term, but seasonal support will eventually arrive in the late winter.

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



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JANUARY 25, 2019

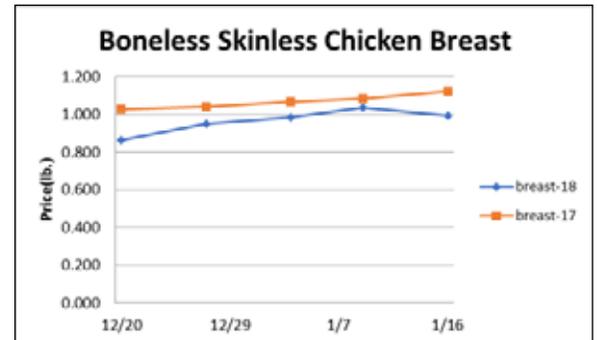
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FOODSERVICE



Poultry

For the week ending January 5th, chicken production was up 8% from the prior year. Amid the active opening week's production schedule, wholesale broiler prices started to rebound as well. Yet, chicken tender prices fell to a multi-year low after opening the year at their highest since 2014. The ArrowStream Chicken Breast Index is showing some signs of life, recently hitting the highest level since early August. Lower wholesale chicken prices have led to higher retail margins on chicken sales relative to history, but even more so when compared to competing proteins such as ground beef. As lower prices find favor with retailers and food service companies, alike the wholesale chicken markets are expected to find further support this winter.

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



Description	Market Trend	Supplies	Price vs. Last Year
Whole Turkey (8-16 lb)	Steady	Good	Higher
Turkey Breast, Bnls/Sknls	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	Decreasing	Short	Higher
Liquid Egg Yolks	Decreasing	Short	Lower
Egg Breaker Stock Central	Steady	Short	Lower



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JANUARY 25, 2019

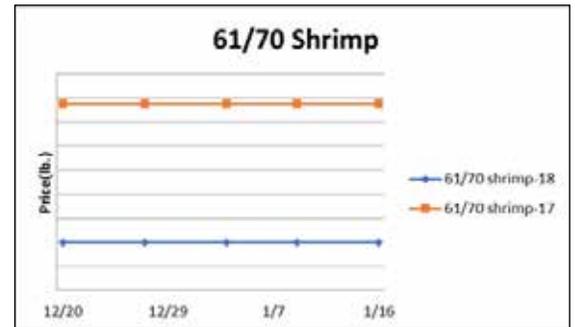
PERFORMANCE
FOODSERVICE



Seafood

Retail seafood prices have been high. In December, the average retail seafood prices were up 4.9% from 2017 and a record for any month. At the same time retail beef, pork and chicken prices during the month were engaging. Elevated retail seafood prices may temper demand during the next several weeks and should mitigate any notable seasonal price inflation.

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



MARKET TRENDS

JANUARY 25, 2019

PERFORMANCE
FOODSERVICE



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.	Decreasing	Good	Lower
PP-HIGP-heavy grade utensils	Decreasing	Good	Lower
PE-LLD-can liners, film, bags	Decreasing	Good	Lower

Retail Price Change from Prior Month

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

Various Markets

Arabica coffee futures have fallen during the last week but are still above \$1.00 per pound. Global coffee supplies are abundant, but the Brazilian real has firmed against the greenback which discourages U.S. coffee imports. The downside risk for Arabica coffee futures from here is likely limited.

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



MARKET TRENDS

JANUARY 25, 2019

PERFORMANCE
FOODSERVICE



Produce

Market Overview

We are continuing to experience winter weather related issues in our growing regions which has caused quality issues with many of the below commodities.

WATCH LIST

- Cucumbers
- Melons (Cantaloupe, Honeydew, Watermelon)
- Mixed Chili Pepper (Anaheim, Poblano, Serrano)
- Sweet Potatoes and Yams
- 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

Supplies industry wide are fair. Most of our volume this week is estimated to be 18's, followed by 12's. We're packing Angelina label due to frost damage. Demand is good, especially for 12's, 18's, and 24's. 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. Due to these factors we are seeing about a 25% shortage in supply and higher prices. They anticipate this until the beginning of February.

Avocados

Avocado markets are steady and slightly stronger. Demand for all sizes and grades is better as we move closer to Superbowl. Promotable prices and many retailers being on promotion is giving a lift to the category. Markets will stay strong through the end of January, although the price should stay around the level's it is at now. There is still plenty of fruit left in the fields to be picked and supply will continue to be good. #2 fruit continues to be a sizeable portion of the current crop.

MARKET ALERT

- **Asparagus – EXTREME**
- **Broccoli – ESCALATED**
- **Cabbage (Green & Red) – ESCALATED**
- **Cauliflower – ESCALATED**
- **Carrots (Jumbo) - ESCALATED**
- **Celery – EXTREME**
- **Cilantro – ESCALATED**
- **Green Bell Peppers - ESCALATED**
- **Green Onions - ESCALATED**
- **Jalapenos – ACT OF GOD**
- **Kale (Green) - ESCALATED**
- **Limes - ESCALATED**
- **Mushrooms – ESCALATED**
- **Squash (Italian and Yellow) - EXTREME**
- **Tomatoes (Rounds) – ESCALATED**



MARKET TRENDS

JANUARY 25, 2019

PERFORMANCE
FOODSERVICE



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: Round beans are readily available with excellent quality available.

Berries:

Blackberries

Prices are up; low temperatures are inhibiting growth in Mexico. Quality is good: berries are juicy and sweet, but some may be smaller than normal due to winter weather. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is climbing. Cold weather has reduced volume in Mexico; offshore stocks are also tight. Quality is average: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

The market is elevated; cold weather is hindering growth. Quality is average, but berry size is below-normal due to low temperatures. Sugar levels range from 13 to 14 Brix.

Strawberries

Expect high prices through January. A series of storms passing over California could bring over four inches of rain to the Oxnard area by Friday, January 18, disrupting production. Quality is average: bleeding, bruising, and shortened shelf-life will remain problems.

Bok Choy

Supplies and quality are good.

Broccoli

Prices are starting to inch down; supplies are increasing. Hollow core and pin rot are industrywide issues, but production crews are culling affected heads at the field level.

Brussels Sprouts

Cool weather in the desert and Mexico is slowing down production and the market is up from last week. Prices are rising and may continue to rise into next week.

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.

Cabbage, Red

ESCALATED Supplies are lower than normal and prices are rising.

Carrots

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

Cauliflower

Prices remain elevated; volume is low in all regions. Quality is good: discoloration and uneven size are occasional problems.

Celery

The market is climbing. Heavy rains are expected to disrupt California celery harvests. Expect quality issues to emerge as excessive moisture in the soil takes its toll on plants.



MARKET TRENDS

JANUARY 25, 2019

PERFORMANCE
FOODSERVICE



Produce (continued)

Cilantro

ESCALATED Supplies are snug this week and conditions are expected to remain this way through next week at the earliest. We are seeing supply and harvest interruptions due to the heavy rain that is falling in Southern California. We are also experiencing light supply crossing through Calexico. We should begin to see harvest crews back in the fields out west early next week. Ince conditions improve this will increase availability.

Corn

Steady supply and good quality out of Florida.

Cucumbers

EAST: FL still has a few loads available, with the majority being off grades. Supply has mostly shifted to off shore Honduras crops. FOBs are feeling upwards pressures and quality is mostly good.

WEST: Sonora & Sinaloa are both producing light supplies due to cooler weather. FOBs are trying to move up. Most Sonora growers will be wrapping up in the next few weeks, leaving only Sinaloa to supply. Quality is fair at best from Sonora, but much better from Sinaloa.

English Cucumbers

Supplies have firmed up due to the last blast of cold weather to hit central Mexico and very light supply out of the northern greenhouses. Markets should be firm for the next 2 to 3 weeks.

Eggplant

EAST: Fancy grades are still extremely tight, while choice is tight, but more available. Production is extremely light this week. FOBs are up significantly with fair quality available. WEST: Eggplant thrives in heat, so with cooler temps, production has slowed drastically. FOBs move up quite a bit with only fair quality available.

Fennel

We continue to see larger sizing out in the field. Quality remains strong overall.

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 demand exceeds supply on both colors especially on the west, 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

Green Cabbage

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

Green Onions

ESCALATED Iced and iceless supply remain extremely short this week. Rain, cold temps and the holidays, have significantly reduced labor output. Volume should slowly start to pick up

Honeydew

We are going out of Mexico with very light volumes and fruit is extremely tight and limited, the Offshore Honeydew 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 supply and will continue to see some quality and shelf life issues.



MARKET TRENDS

JANUARY 25, 2019

PERFORMANCE
FOODSERVICE



Produce (continued)

Kale (green)

ESCALATED Quality is fair. The market is active, and prices are increasing.

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.

Lettuce:

Butter

Supplies, demand, and quality are good.

Green/Red Leaf

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

Iceberg Lettuce

Quality has been good overall, but there are still signs of frost damage. The market is back to normal after holiday pull. Demand is up, due to business from schools being back in session. We are expecting the market to remain steady.

Romaine

We are seeing some minor epidermal peel and blistering, due to the cold weather in the Imperial Valley. Labor and weather have been an issue.

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 climbing. Crossings from Mexico into the U.S. are down at this time of year; supplies are limited. The crop is dominated by 110- to 150-count sizes. Quality is very good: skins are smooth and deep green.

Napa

Demand, supply, and quality are all good.

Onions

The market is up; demand is strong. Expect high prices until Mexican- and Texas-grown supplies hit the market in February and March. Northwestern white onion supplies will be very limited for the rest of the season.

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 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: As South Florida moves into their winter crown picks, we continue to see light supplies. Yields were heavily affected by bloom drop and fruit loss from prior weather events, which amplifies the already reduced yields. Sizing continues to be an issue as well, with the crop leaning towards more large size and less choice availability. FOBs remain high and quality is mostly good.

WEST: Mainland MX's crop has yet to rebound from the colder temps and rain. We will see the recent warm weather aide crop production in the near future. Until then, FOBs remain high with fair to mostly good quality available.



MARKET TRENDS

JANUARY 25, 2019

PERFORMANCE
FOODSERVICE



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: it's still critical in MX with prices going up yet again. Supply & FOBs are not expected to improve until at least February. Quality continues to be fair at best on the entire category.

Red Bell Pepper

EAST: Despite the firm green pepper market, there is a fair amount of red pepper now available. FOBs are declining slightly with mostly good quality available. There are some shaky lots around, buyer beware.

WEST: Despite the firm green pepper market, there is a fair amount of red pepper now available. FOBs are declining slightly with mostly good quality available.

Pineapple

High prices persist; supplies are scarce in Costa Rica and Mexico (into Texas). Quality is average: fruit is firm, yet juicy, with sweet, slightly tangy flavor. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

Although prices are erratic, they should become steady 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

The market is unchanged. Inspectors are closely monitoring finished cartons for chunks and core material to achieve the best quality packs.

Snow and Sugar Snap Peas

WATCHLIST Expect industry wide quality/availability issue 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

Prices are high; freezing temperatures and lettuce ice are reducing volume. Quality is good, but some of the more fragile varieties are not meeting shelf-life expectations.

Yellow Squash/Zucchini

EAST: Production is limited to South Florida with light yields available. Scarring, scuffing, and some discoloration are the biggest concerns which are byproducts of winter weather events. It is fair to say that quality is poor at best. FOBs are pushing upward with the very limited supply.

WEST: Very similar to the east, winter weather took a heavy toll on the squash category. It will be at minimum 10-14 days before any relief might be seen. Both yellow & green are extremely tight with only poor quality available.



MARKET TRENDS

JANUARY 25, 2019

PERFORMANCE
FOODSERVICE



Produce (continued)

TOMATOES EAST

Rounds

Naples/Immokalee is still the predominant player and seeing steady harvest numbers each week. Homestead also has some volume to replace the Ruskin crop. Weather has been cooler in the growing regions, which is resulting in just slightly less overall tonnage. The forecast looks to have cooler temps on the horizon as well so do not expect a flush to come on board. Additionally, will less overall acreage available, there isn't a "bumper crop" per say of volume to be had this year. Look for FOBs to remain mostly constant week over week, especially on 5x6 & 6x6 sizes. There is some slight upward pressure on mediums. Most growers are in crown picks, but even those in 2nd pickings are seeing good looking fruit. Therefore, quality is excellent from all regions, excluding any leftover picks from the Ruskin market.

Romas

As we progress through the winter season, we are seeing the crop run a bit to the bigger side. Jbo/XI are more readily available, while Lg/Md/Sm are less readily available. Despite harvest numbers being down due to cold weather, we are seeing downward pressure on FOBs as MX ramps up their season (see west update). Quality is excellent.

Grapes – There is still a small amount of volume coming from Palmetto/Ruskin, however majority of good quality grapes are coming from our Immokalee, Naples & Homestead crops. Production numbers seem to be nice and steady. Look for FOBs to move downward and good quality to hit your docks.

Grapes

There is still a small amount of volume coming from Palmetto/Ruskin, however majority of good quality grapes are coming from our Immokalee, Naples & Homestead crops. Production numbers seem to be nice and steady. Look for FOBs to move downward and good quality to hit your docks.

Cherries

Things are steady on the cherry front. No changes in supply or prices for next week. Quality is a little weaker with fair to good available.

TOMATOES WEST

Rounds

Week after week, we have been reporting that we are so close to that next level of volume crossing through MX. But week after week, we continue to see total crossing volume not as significant as expected. It's a very, very slow increase due to weather. MX continues to see cooler temps periodically, slowing the fruit's growth cycle. With warmer temps last week, and more warm temps coming next week, we look forward to seeing more fruit cross in the next 10-14 days, pending Mother Nature of course. Until then, bigger size fruit (4x4 & 4x5) has become just slightly more readily available while smaller sizes (5x5 & 5x6) are less readily available. FOBs ever-so-slightly declining. On the bright side, quality is absolutely beautiful.

Romas

Finally. Some good news! Mainland MX's crop is off to the races with good numbers picking up daily. We're seeing a reasonable amount of relief on FOB with excellent quality available. Assuming Mother Nature places nice in the sandbox, we should see this trend continue.

Grapes

Good supply crossing daily is putting further downward pressure on FOBs. Quality has improved with great looking fruit hitting docks daily.

Cherries

Good volume continues to cross Nogales daily. FOBs are down slightly, however, quality has declined. Things are fair at best in the cherry market, so we recommend keeping a tighter than usual inventory.

Watermelons

Elevated prices persist; Production has transitioned to Southern Mexico, increasing freight costs to the U.S. Overall availability is below normal. Quality is average: sugar levels are below normal due to cold weather.

