



MARKET TRENDS

FOR WEEK ENDING FEBRUARY 22, 2019



MARKET TRENDS

FEBRUARY 22, 2019

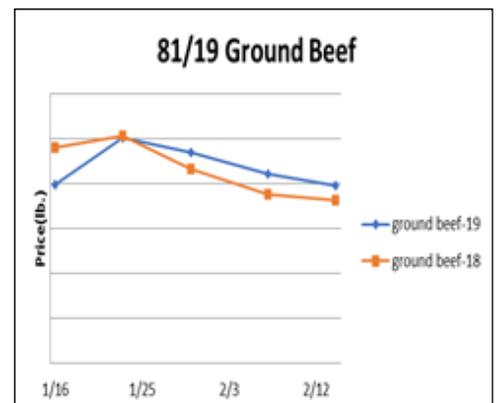
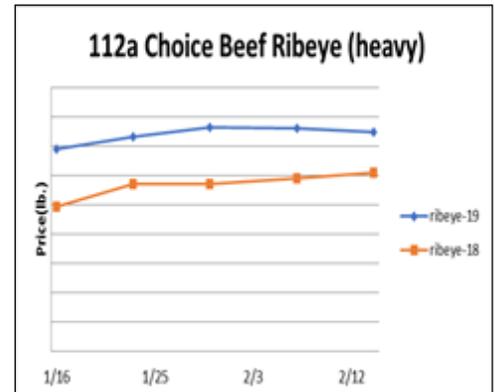
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Last week, cattle slaughter came in at an aggressive 614k head, 4.2% larger (y-o-y) while beef production posted a 5.1% increase compared to a year ago. The Choice boxed beef cutout has become choppy but remains higher than year ago price levels. Choice middle meat prices have been strong, but more recently, the round complex has picked up as well. The beef 50s have edged higher, pricing in the mid-\$0.60s, but are still nearly 20% below a year ago. Seasonal increases on the fat trim markets are expected into late Q2. Domestic 90s continue to climb and are projected to have addition upside potential into early spring.

| Description | Market Trend | Supplies | Price vs. Last Year |
|------------------------------|--------------|----------|---------------------|
| Live Cattle (Steer) | Increasing | Short | Lower |
| Feeder Cattle Index (CME) | Increasing | Short | Lower |
| Ground Beef 81/19 | Decreasing | Good | Higher |
| Ground Chuck | Decreasing | 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) | Decreasing | Good | Lower |
| 116 Chuck (sel) | Increasing | Good | Lower |
| 116 Chuck (ch) | Decreasing | Good | Lower |
| 116b Chuck Tender (ch) | Decreasing | Good | Higher |
| 120 Brisket (ch) | Increasing | Good | Higher |
| 120a Brisket (ch) | Decreasing | Good | Lower |
| 121c Outside Skirt (ch/sel) | Increasing | Good | Higher |
| 121d Inside Skirt (ch/sel) | Decreasing | Good | Higher |
| 121e Cap & Wedge | Increasing | Good | Higher |
| 167a Knuckle, Trimmed (ch) | Increasing | Good | Higher |
| 168 Inside Round (ch) | Increasing | Good | Higher |
| 169 Top Round (ch) | Decreasing | Good | Higher |
| 171b Outside Round (ch) | Increasing | Good | Higher |
| 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) | Increasing | Good | Lower |
| 184 Top Butt, boneless (ch) | Increasing | Good | Higher |
| 184 Top Butt, boneless (pr) | Increasing | Good | Higher |
| 184-3 Top Butt, bnls (ch) | Increasing | Good | Higher |
| 185a Sirloin Flap (ch) | Decreasing | Good | Higher |
| 185c Loin, Tri-Tip (ch) | Increasing | Good | Higher |
| 189a Tender (sel, 5 lb & up) | Decreasing | Good | Higher |
| 189a Tender (ch, 5 lb & up) | Increasing | Good | Higher |
| 189a Tender (pr, heavy) | Decreasing | Good | Lower |
| 193 Flank Steak (ch) | Steady | Good | Higher |
| 50% Trimmings | Increasing | Good | Lower |
| 65% Trimmings | Increasing | Good | Lower |
| 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 | Higher |



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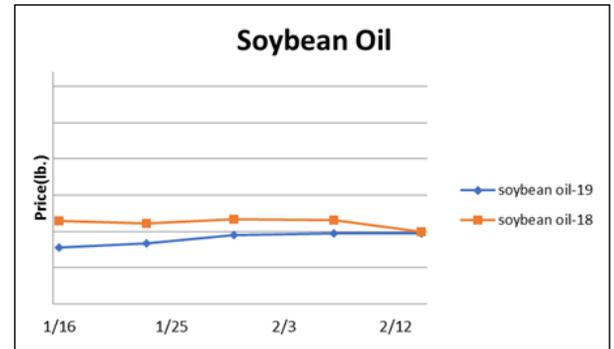
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Grains

The USDA is estimating 2019-20 U.S. winter wheat acreage to be down 1.1% from the prior crop and the smallest in over a century. However, the crop in the U.S. is progressing under favorable conditions with soil moisture conditions the best for this time of the year since 2010. The wheat markets could remain range-bound.

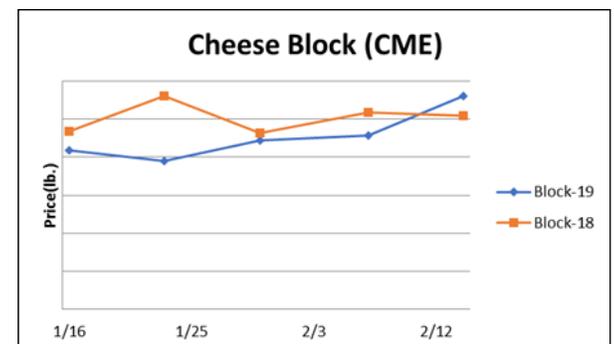
| Description | Market Trend | Supplies | Price vs. Last Year |
|--------------------------|--------------|----------|---------------------|
| Soybeans, bushel | Decreasing | Good | Lower |
| Crude Soybean Oil, lb | Steady | Good | Lower |
| Soybean Meal, ton | Increasing | Good | Lower |
| Corn, bushel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



Dairy

The cheese markets have risen over the last week with block and barrel prices achieving their highest levels since October. In November, U.S. cheese exports were down 9.5% versus 2018. Exports to Mexico were down 6.5%, but since June, sales to Mexico were up 5.2% (y-o-y). Similar years in which cheese prices rallied during the early-winter saw firm prices persist into the summer. Spot butter prices have softened since last week. In November, U.S. butter imports were up 42%, but exports were down 9.3% from last year. History hints that lower butter prices can occur in the near term.

| Description | Market Trend | Supplies | Price vs. Last Year |
|------------------------|--------------|----------|---------------------|
| Cheese Barrels (CME) | Increasing | Good | Higher |
| Cheese Blocks (CME) | Increasing | Good | Higher |
| 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) | Decreasing | Good | Higher |
| Nonfat Dry Milk | Increasing | Ample | Higher |
| Whey, Dry | Decreasing | Good | Higher |
| Class 1 Base | Steady | Good | Higher |
| 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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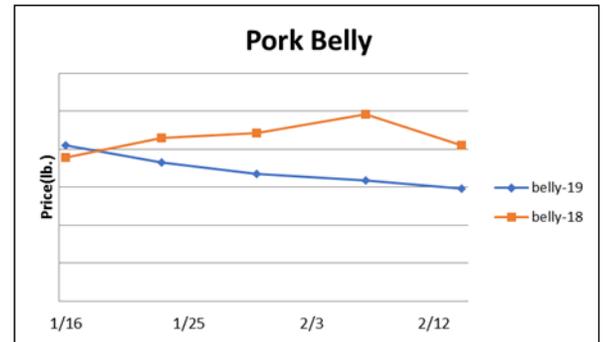
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Pork

Last week, pork production rose just over 5% from the prior week and the previous year. However, another bout of winter weather is expected to temper this week's production schedule, potentially supporting the USDA pork cutout in the near term. The pork belly markets have been volatile, especially intra-day from USDA reporting. Belly prices have become attractive over the past four weeks, but further seasonal weakness is likely into late winter. China remains a key unknown for the pork markets but expect price support if a trade deal is met.

| Description | Market Trend | Supplies | Price vs. Last Year |
|------------------------------|--------------|----------|---------------------|
| Live Hogs | Decreasing | Ample | Lower |
| Sow | Increasing | Ample | Lower |
| Belly (bacon) | Decreasing | Good | Lower |
| Sparerib(4.25 lb & down) | Decreasing | 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) | Increasing | 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 | Decreasing | Good | Lower |
| 72% Trimmings | Decreasing | Good | Lower |



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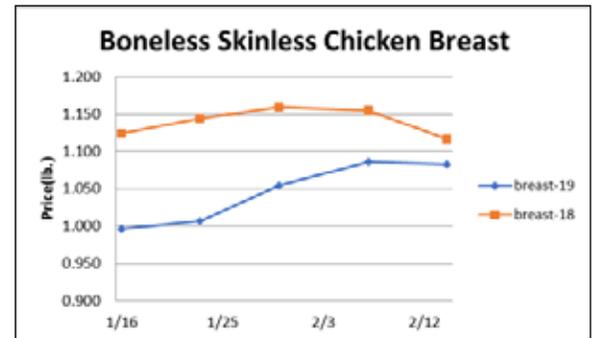
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Poultry

For the week ending February 2nd, chicken production increased 2.9% from the week prior, but fell 2.3% year-over-year. Integrator margins remain favorable, and increasing chicken production is expected in the coming months. However, lighter production schedules the past six weeks (down 0.7% (yoy)), could support broiler prices in the interim. The seasonal price move for wings from late-December to pre-Super Bowl (this year) far exceeded expectations, up 33% across those seven weeks. Expect chicken wing prices to fade into early spring before leveling off. Similarly, chicken tender price gains may be slowing but there is upside potential for chicken breast prices into the spring.

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



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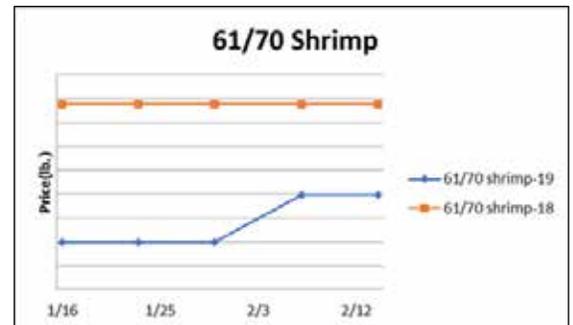
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Seafood

The elevated value of the U.S. dollar continues to fuel strong shrimp imports. During November, the U.S. imported 5.5% more shrimp than the prior year and at much lower prices. Strong U.S. shrimp imports are anticipated to persist through the winter which should temper the upside in the markets. But the downside risk in the shrimp markets is likely limited as well.

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

Retail Price Change from Prior Month

| Description | Jan-19 | Dec-18 | Nov-18 |
|-----------------------------|------------|------------|------------|
| Beef and Veal | Increasing | Decreasing | Increasing |
| Dairy | Increasing | Increasing | Decreasing |
| Pork | Increasing | Decreasing | Decreasing |
| Chicken | Decreasing | Increasing | Decreasing |
| Fresh Fish and Seafood | Increasing | Increasing | Increasing |
| Fresh Fruits and Vegetables | Increasing | Increasing | Decreasing |

Various Markets

Global sugar futures (#11) experienced modest firmness since last week. Brazil sugar this year has been going mostly to ethanol production instead of consumption usage due to rising petroleum prices. An important price support level for nearby international sugar (#11) futures is \$.124.

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



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Produce

Market Overview

We are still experiencing winter weather related issues in our growing regions which has caused quality issues with many commodities, especially iceberg, romaine, and romaine hearts

WATCH LIST

- Melons (Honeydew)
- Sweet Potatoes and Yams

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. Demand is fair and prices are lower.

Arugula

Supply is good, but we may start to see mildew because of the rain last weekend. Field ice is expected during the 2nd half of the week, which could cause some yellowing.

Asparagus

Prices are weak; Mexican volume is high. Quality is best in Mexico: spears are straight and firm with pleasantly bitter flavor.

Avocados

Markets are getting better. Demand is still sluggish, but supplies are being limited as to what is coming into the US from MX. Most sizes and grades are getting pushed up. Certain areas of the country have been slower because of weather. The border is fairly clean, and some orders are seeing delays. #2 fruit is cleaning up as well with less available supplies overall.

Bananas

Supply will be tight for the next 3-4 weeks. Difficult growing conditions are affecting the stubbornness of the fruit. Fruit is taking longer than normal to ripen.

Beans

ROUND BEANS ARE READILY OBTAINABLE WITH EXCELLENT QUALITY AVAILABLE.

MARKET ALERT

- Cabbage (Red) **ESCALATED**
- Carrots (Jumbo) - **ESCALATED**
- Cauliflower - **ESCALATED**
- Celery - **EXTREME**
- Green Onions - **ESCALATED**
- Kale - **ESCALATED**
- Limes - **ESCALATED**
- Mixed Chili Pepper (Jalapeno and Serrano) - **ESCALATED**
- Mushrooms - **ESCALATED**



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Produce (continued)

Berries:

Blackberries

Prices are unchanged. Stocks are sufficient, but the season is past its peak, so volume will start to diminish. Quality is good: berries are deeply colored, juicy, and sweet. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is low; Mexican and offshore supplies continue to increase. Quality is average: berries are dark blue with a slight blush and sweet, yet tangy flavor.

Raspberries

The market has stabilized; stocks are adequate. Quality is average: rain continues to affect California production. Sugar levels range from 13 to 14 Brix.

Strawberries

Prices remain high. Supplies are tight as heavy rainfall has been affecting the California growing regions. Demand is strong for Mexican berries. Quality is average: bleeding, bruising, and shortened shelf-life persist throughout the industry.

Bok Choy

Supply and quality are good.

Broccoli

Prices are weak; stocks are ample in all regions. Quality is best in the Arizona desert region; hollow core and pin rot are industry-wide problems that harvesting crews are removing 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 increased and we have good supplies, and heavier volumes landing on the east coast. The overall quality has been good with a firm green to straw cast and sugars have been much better on this weeks and last week's arrivals. There are good supplies of 9's, 12's and a few 15's. We expect continued good volumes going forward and quality should hold good as well.

Carrots

ESCALATED Jumbos are still escalated, but we are seeing improvements.

Cauliflower

Prices have risen; supplies are starting to tighten. Quality ranges from poor to excellent: discoloration and uneven size are industry-wide problems.

Celery

The market is high; the Oxnard growing region continues to be impacted by rain. Quality is fair: pith and growth cracking are issues.

Cilantro

Supply is improving. Quality is fair.

Corn

Steady supply and good quality out of Florida.

Cucumbers

EAST: Honduras's import numbers are down slightly, mostly due to the lackluster demand. Thus, putting some upward pressure on FOBs, but not enough to cause concern. Quality is mostly excellent; however, some containers have seen some slight trouble spots.

WEST: Mexico's production was down just slightly last week, but it is expected to pick right back up where it left off. FOBs tried to go up last week, but that market will not hold. Look for downward pressure moving into next week. Quality is excellent.



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Produce *(continued)*

English Cucumbers

Supply has 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: Florida's supply is still a little light but improving. FOBs are down slightly with fair to good quality available.
WEST: Warmer weather has helped improved supply over the last two weeks. FOBs are down slightly with mostly good quality available.

Fennel

Supply on fennel will be short for the next few weeks due to frost damage and the Yuma season finishing with light supply. We will continue to see a majority of 24/30ct this week - 18s and 36s will remain limited.

Garlic

Supply is firming up and markets are active.

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 still exceeds supply on both colors especially on the west we have received 50% less volume than normal to date, as the Chilean Ports were on strike and volumes are down due to some of the early varieties in Chile have been pulled out and new varieties planted but production not at full capacity this year, the Long Beach Pier was also slow playing the unloading process. The Chilean volumes will start to increase around late February, but prices and availability will continue to be tight until then and prices will stay firm. The overall quality has been good to fair, greens are exceptionally tight, and you will see some minor discoloration, the reds have been stronger but both colors should get better in the coming weeks.

Green Cabbage

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

Red Cabbage

ESCALATED Supply is fairly tight.

Honeydew

Demand Exceeds supply we are going out of Mexico with very light volumes and fruit is extremely tight and limited there are some 8's available and hoping to see more crossing from Mexico next week. 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.

Kale (green)

ESALATED Supply is improving.

Lemons

We have finished our Dist. 3 (Desert) crop and going with heaviest volume here out of Dist. 1 (Central Valley) and will start to pick some Dist. 2 (Coastal Regions) fruit in the coming weeks and just primarily size picking to relieve the trees of some stress. We will also have disruptions on harvesting in Dist. 1 and 2 as the rains are going to blanket the state, through Tuesday of next week. We will also keep you posted on when we will be getting back in to pick next week. The moisture has also been creating spores in the fields as well and we will hope that it is not to extensive on the clear rot.

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Produce *(continued)*

Lettuce:

Butter

Supply and demand are good. Quality is fair.

Green Leaf

Supply and quality are fair. The rain this weekend will continue to take a toll on the crop. We are having issues with slight yellowing and lighter weights. Yields continue to take a hit, which will create lighter supply this week.

Red Leaf

Supply, demand, and quality are good.

Iceberg Lettuce

Lettuce supply continues to be steady. There will be small signs of mildew stain and some weak-tip damage due to the freezing temperatures.

Romaine

Supply has returned to normal; however, the cold over the weekend will adversely affect romaine quality.

Romaine Hearts

Demand is good. Supply and quality are fair.

Limes

The market is elevated; overall shipments into the U.S. are down. Supplies are forecast to be limited through March, especially small sizes.

Napa

Supply and quality are good. Demand is fair.

Onions

Looking at weaker numbers on all the yellow onions except medium. Supplies seem to be strong enough to hold fobs down. We say the market work its way up in December and January, but this slight downturn has slowed the momentum. Red onions are plentiful in Idaho, Oregon and Washington. Many shippers are out of white onions but are bringing some in on an order by order basis, this market has not moved off of its three-week pinnacle. Many will wrap up our Idaho/Oregon onion season around mid-April. From there we will transition to southern Cal.

Oranges

We have rain starting today and forecasted through Tuesday of next week, we were able to get some fruit picked Yesterday as we had to wait for fields to dry enough to get in yesterday after our rains this last weekend. We were picking borders and did not get as much fruit as we would like picked. We should be able to make it through with supplies just depends on how much rain we get as the forecast is all over the board anywhere from 3-7 inches depending on who you listen to through the first of the week. We are experiencing some clear rot and will probably continue with all the moisture in the ground. The overall color is full, and the fruit is eating good, and will only get better once the sun comes out as the water does leach out some of the sugar. We will keep you posted Monday if this storm does any damage and to what we see for next week as far as picking. We sure need the moisture, but it does cause some problems and interruptions, but we will get through it.

Parsley(Curly, Italian)

Supply and quality are good.

Green Bell Pepper

EAST: FL is finally seeing some relief, but not because supply has increased in the area. MX is starting to increase taking the pressure off FL. Good weather is in the forecast which should help boost the crop and give additional relief. Look for FOBs to fall a few dollars. Quality is still only good at best, with soft walls being the main concern.

WEST: Mexico's crop is starting to rebound from the summer & fall weather. Jalapenos & Serranos are still snug and FOBs are still high, however, there is relief on the horizon as they slowly start to slip with more blocks coming on board weekly. Quality is starting to improve as well with mostly good available. However, there are still some weaker crops, therefore, we recommend for another few weeks to keep a tight inventory.



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Produce (continued)

Jalapeños (Chiles)

EAST: Florida's light production at this time of year is starting to feel some relief as MX's crop is finally rebounding from prior weather events. Spring crops will bring more volume. Until then, FOBs are still high with good quality available.

WEST: Mexico's crop is starting to rebound from the summer & fall weather. Jalapenos & Serranos are still snug and FOBs are still high, however, there is relief on the horizon as they slowly start to slip with more blocks coming on board weekly. Quality is starting to improve as well with mostly good available. However, there are still some weaker crops, therefore, we recommend for another few weeks to keep a tight inventory.

Red Bell Pepper

EAST: The strong supply from the last few weeks from Guatemala has started to lighten up. No shortages to report, but market pressure is feeling a little firmer. Look for FOBs to start increasing. Good to excellent quality is still available.

WEST: The strong supply from the last few weeks from Mexico has started to lighten up, especially on yellow pepper. No shortages to report, but market pressure is feeling a little firmer. Look for FOBs to start increasing, especially on yellow. Good to excellent quality is still available, but please note that some pepper is not showing full color (20-30% greening roughly).



Pineapple

Prices are low. Stocks are ample, especially 7 and 8-count sizes. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

Markets are holding mostly unchanged this week verses last. Overall supplies seem to be good across the state with most sheds having product for sale. For the balance of the season we should see the large potatoes hold market and slowly increase the closer we get to June. Small potatoes will be the most available, again, it's some 80's but mostly 90's, 100's and 2's.

Radishes

Markets are firming up due to heavy precipitation and wind damage to fields. We see FOB pricing ticking up this week.

Salad Blends

The market is level. Iceberg stocks sufficient; romaine supplies are tighter due to issues with epidermal blistering and peeling. Inspectors are closely monitoring finished cartons to achieve the best quality packs.

Snow and Sugar Snap Peas

Quality is good, and supply is increasing.

Spinach (Bunched)

We are seeing some mechanical damage; however, quality is fair. This issue could continue from recent rain.

Spinach (Baby)

Supply is good. There could be some quality issues, due to cold weather.

Spring Mix

Prices are unchanged; supplies are average. Quality is very good.

Yellow Squash/Zucchini

EAST: Florida's squash supply has increased with the favorable weather conditions and new blocks starting. FOBs are low with mostly good quality available. There are still some quality concerns with yellow.

WEST: Mexico's squash supply has increased with the favorable weather conditions. FOBs are low with mostly good quality available. There are still some concerns with yellow (wind scar mostly).

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Produce (continued)

TOMATOES EAST

Rounds

Florida's production continues to truck along steadily. Growers are currently in crown, 2nd and even 3rd picks with a steady amount of volume of all sizes readily available. Historically, the next two weeks will be somewhat the "peak" of production. Following this we will see supply start to slowly taper down. There is downward pressure on FOBs as Mexico continues to push good supply through borders. Quality varies by grower, with our Crimson being one of the best tomatoes in the marketplace. Some of the concerns seen are stem decay, scarring & extreme yellow coloring.

Romas

Florida's production continues to truck along steadily. There is more downward pressure on FOBs as Mexico continues to push good volume through borders, giving Florida the needed relief to supply the east coast comfortably. Similar to rounds, quality varies by grower with most fruit good to excellent.

Grapes

Yields have improved in Florida with the help of consistent warm temperatures, putting slight downward pressure on FOBs. Quality is mostly excellent.

Cherries

Things are steady on the cherry front. No changes in supply or prices for next week. Quality is mostly good.

TOMATOES WEST/MEXICO

Rounds

Mainland Mexico's stride is strong with winter production in full swing. There is excellent volume available for large fruit, with smaller sizes are coming up a bit short. Import volume from Puerto Rico is down as the domestic market falls. Growers can get a premium on the island versus import prices. FOBs linger close to the minimum, but haven't quite made it that low yet, especially on small fruit. Quality from MX is overall excellent, however, there have been some reports of soft fruit from various fields.

Romas

Mainland MX's crop has great volume available, with good numbers expected to last through mid Feb, barring weather. FOBs are at or close to the minimum. Quality is excellent.

Grapes

Promotional volume is crossing regularly from MX. FOBs are steady week over week with excellent quality available.

Cherries

Excellent volume continues to cross Nogales daily. FOBs are steady; however, quality has dipped with only fair to good quality available. We recommend keeping your inventory snug until quality improves. Shelf life is affected.

Watermelons

Prices are steady, but because supplies are shipping from Southern Mexico, freight cost to the U.S. are higher than normal. Availability remains tight. Quality is good: sugar levels are average for this time of year.

