



MARKET TRENDS

FOR WEEK ENDING FEBRUARY 8, 2019



MARKET TRENDS

FEBRUARY 8, 2019

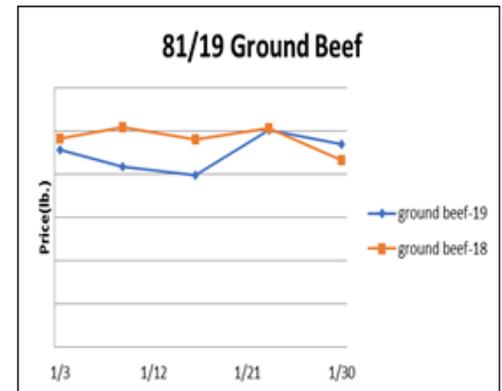
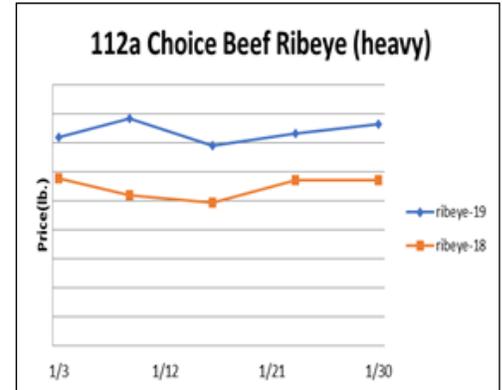
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Beef production eased heading into late January, down 1.6% week-to-week, but was up 3.4% year-over-year. The Choice boxed beef cutout continues to outperform expectations, up near 5%, year-over-year, with the middle meats the main driver of those gains. Choice 112A heavy ribeyes are up near 12% year-over-year, with tenderloins up 15%. While beef prices are expected to seasonally rise heading into the spring, already costly late-winter pricing should temper those gains. Beef 50% trimmings have been pricing mostly flat in the mid-\$0.50s, but down 35% (yoy). This presents good value with higher spring pricing expected.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Decreasing	Short	Lower
Feeder Cattle Index (CME)	Increasing	Short	Lower
Ground Beef 81/19	Decreasing	Good	Higher
Ground Chuck	Decreasing	Good	Higher
109 Export Rib (ch)	Decreasing	Good	Higher
109 Export Rib (pr)	Increasing	Good	Lower
112a Ribeye (ch)	Increasing	Good	Higher
112a Ribeye (pr)	Increasing	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)	Increasing	Good	Lower
120 Brisket (ch)	Decreasing	Good	Higher
120a Brisket (ch)	Decreasing	Good	Higher
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	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	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)	Steady	Good	Higher
184 Top Butt, boneless (pr)	Increasing	Good	Lower
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)	Decreasing	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	Steady	Good	Lower
85% Trimmings	Increasing	Short	Lower
90% Trimmings	Increasing	Short	Lower
90% Imported Beef (frz)	Decreasing	Good	Lower
95% Imported Beef (frz)	Steady	Good	Lower
Veal Rack (Hotel 7 rib)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Lower



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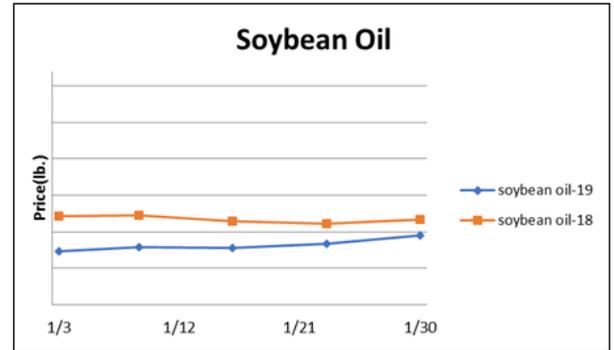
PERFORMANCE
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Grains

Soybean oil and palm oil prices rose to a seven month high this week. Solid demand is partly behind the increase, but world economic concerns are building, and U.S. soybean supplies are burdensome. This is likely to limit any further upside potential for the soybean oil and palm oil markets in the near term.

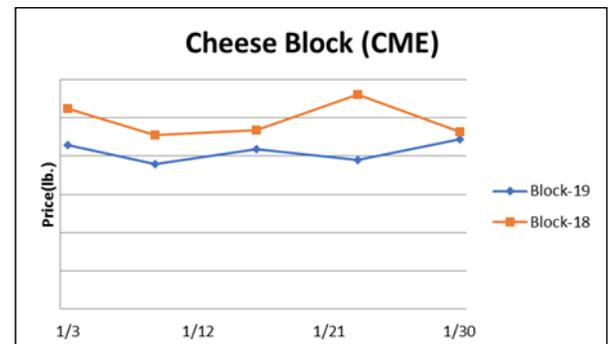
v	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Higher
Distillers Grain, Dry	Decreasing	Good	Lower
Crude Palm Oil, lb BMD	Increasing	Good	Lower
HRW Wheat, bushel	Decreasing	Good	Higher
DNS Wheat 14%, bushel	Decreasing	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. Value purchases occurred after cheese barrel prices hit the lowest level since 2009 earlier this month. CME Class IV milk futures for 2019 are averaging 6.4% higher than the equivalent Class III milk futures which encourages milk to go to milk powder and butter production. This factor should support cheese prices in the coming months. Spot butter prices this week hit a nine-week high. Demand is good but prices usually decline modestly in 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)	Increasing	Good	Higher
Nonfat Dry Milk	Increasing	Ample	Higher
Whey, Dry	Decreasing	Good	Higher
Class 1 Base	Steady	Good	Higher
Class II Cream, heavy	Decreasing	Good	Higher
Class III Milk (CME)	Decreasing	Good	Higher
Class IV Milk (CME)	Decreasing	Good	Higher



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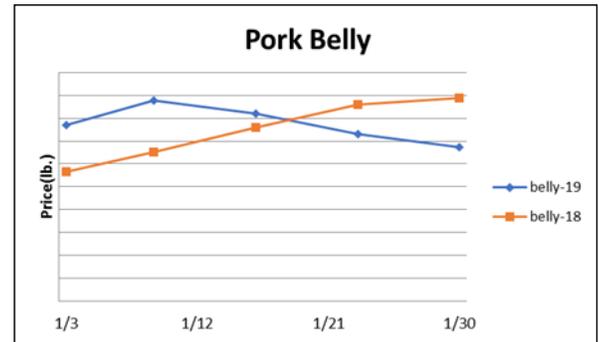
PERFORMANCE
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Pork

Last week, pork production held steady, week-to-week, but was up near 6% year-over-year. The USDA pork cutout value continues to lag due in part to the larger production schedules, but the lean hog futures market is pricing in a great deal of optimism from Q2 onward. Continued ASF struggles in China are likely the root of the buoyed hog futures market, but the upside from here appears a bit rich, at this point. Pork belly prices saw a sharp correction lower as of late and appear to have put in a seasonal top. Prices may be on the defensive into early Q2.

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



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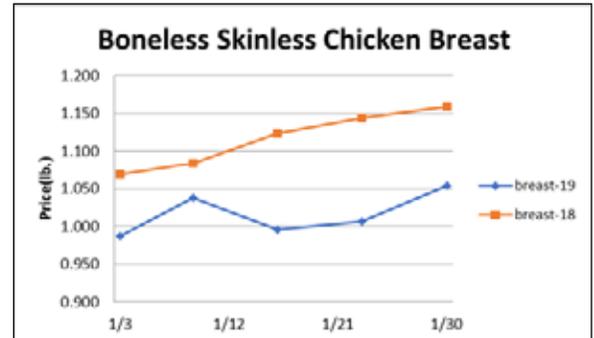
PERFORMANCE
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Poultry

For the week ending January 19th, chicken production was up 12% year-over-year, with increases noted across all classes of birds. Despite the staunch increases in output, the six-week rolling average was up only marginally. The larger broiler production was likely in advance of the hazardous winter weather, which may stall the recent price appreciation experienced for chicken over the past several weeks. Wing prices should be near a seasonal peak ahead of this weekend's Super Bowl, plus March Madness forward buying is likely culminating as well. Tenders remain the star performer of the bird, with prices up 3% year-over-year and the highest since early August.

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	Higher
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)	Decreasing	Good	Higher
Leg Quarter Index (ARA)	Increasing	Good	Lower
Thighs, Bone In	Decreasing	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/Sknl	Steady	Good	Higher

Eggs

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



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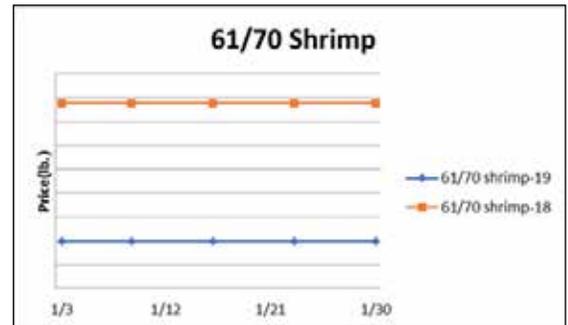
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Seafood

The shrimp markets traded well below the previous year levels during the fall. This is due in part to a high value of the U.S. dollar encouraging shrimp exports to the U.S. Concerns are building that the world economy, particularly in Asia, is slowing. If so, this could push more shrimp to the U.S. in the coming months which could weigh heavy on prices.

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	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 declined over the last week after rising in the previous five weeks. Brazil is coming off a very strong coffee harvest, but there are some dry weather concerns for their upcoming production year. Arabica coffee futures likely put in a long-term bottom last September (\$.935).

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	Higher
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

We are still experiencing winter weather related issues in our growing regions which has caused some quality issues with commodities.

WATCH LIST

- Limes
- Melons (Cantaloupe, Honeydew, Watermelon)
- Mixed Chili Pepper (Anaheim, Poblano, Serrano)
- 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

Light supplies of artichokes are expected to continue for several weeks. Supplies industry wide are fair, demand is good and prices are steady on most sizes.

Arugula

Supplies and quality are improving because of warmer temperatures in the desert. We are seeing some yellowing and mildew could become an issue if it rains in the desert this week.

Asparagus

Expect high prices at least through this week; stocks are limited in both regions. Quality is average: spears are straight and firm with pleasantly bitter flavor.

Avocados

Markets are going through the yearly Superbowl weakness, mostly on large sizes. Smaller sizes continue to stay steady and in some cases are slightly stronger. Demand is very good at destination as everyone loads up for Superbowl promotions. After 3 heavy weeks of picking, Mexico is backing off this week to let the demand pull the fruit through the system. #2 fruit is still a little bit weaker, but a good pull over the weekend could help clean it up. February should continue to stay steady with prices slightly higher than what they are now.

Bananas

Supplies will be tight for the next 3-4 weeks. This lower volume should affect only market customers. Contracted customers should see no issues. Quality is good at this time, and generally 1st semester of the year should be smooth for the program.

MARKET ALERT

- **Cabbage (Green & Red) – ESCALATED**
- **Carrots (Jumbo) - ESCALATED**
- **Celery – EXTREME**
- **Green Bell Peppers - ESCALATED**
- **Green Onions - ESCALATED**
- **Jalapenos – ACT OF GOD**
- **Kale - ESCALATED**
- **Mushrooms – ESCALATED**
- **Strawberries - ESCALATED**



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Produce *(continued)*

Beans

EAST: Weather slowed things down for our Florida beans. Supply is still a little tight with FOBs moving upward. Quality for now is nice, but we could see concerns down the road due to colder weather and rainfall.

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

Berries:

Blackberries

Prices are steady; stocks are sufficient. Quality is good: berries are juicy and sweet. Size has increased to normal. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is unchanged; warmer weather is aiding growth, increasing supplies. Quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

The market is level; supplies are adequate. Quality is good: berry size has returned to normal with warmer weather. Sugar levels range from 13 to 14 Brix.

Strawberries

Prices remain high. Mexico is the main growing region. Florida volume is extremely low; erratic weather is limiting color on the fruit. Rain is forecast for the Oxnard, California region again; this will further limit domestic supplies. Quality is average: bleeding, bruising, and shortened shelf-life are industry-wide problems.

Bok Choy

Supplies and quality are good.

Broccoli

Prices are weak; higher temperatures increased volume in all growing areas. Hollow core and pin rot are industry-wide problems, but harvesting crews continue to cull 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 lighter 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

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

Cauliflower

Prices are weak; volume is high in all regions. Quality is average: discoloration and uneven size are industry-wide problems.

Celery

High markets persist; yields remain extremely low. Quality is fair: pith and growth cracking are issues.

Cilantro

Supplies are improving this week and markets have dropped. We expect steady supply over the next week.



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Produce (continued)

Corn

Steady supply and good quality out of Florida.

Cucumbers

EAST: FL has wrapped up with Honduras being the core supplier right now. There is a reasonable amount available with good quality. FOBs are mostly steady.
WEST: MX's fields caught up from the cooler weather and are now producing a good amount of volume. FOBs are down slightly with excellent quality available.

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: Production is very light as FL has had to wrap up some fields early due to weather and quality. FOBs remain high with fair quality available.
WEST: There are significant concerns with the quality of the crop due to cold weather. MX's supply has lightened up because of this. Look for FOBs to move up and expect fair quality at best. Improvement is expected in the next 10-14 days barring weather.

Fennel

We will have good supplies on fennel this week and should have extra product to sell each day. We will see a majority of 24ct this week, with good availability on 30ct as well. Quality remains strong overall.



Garlic

Supplies are 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 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 around mid-February, but prices and availability will continue to be tight until then and prices will stay firm. The overall crop volume out of Chile is of normal size but the volumes have been much lighter than in years past so far. 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

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

Honeydew

Demand Exceeds supply we are going out of Mexico with very light volumes and fruit is extremely tight and limited there are no 8's available and hoping to see some 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 supplies and will continue to see some quality and shelf life issues.

Kale (green)

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

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Produce *(continued)*

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. The overall quality out of Dist. 1 looks good and the fluctuation in temperatures from day to night has also helped to bring on color and strengthening the fruit. We are still gassing 24 hours on some blocks others we are full natural color. We expect the quality to stay good, until we see some warm temperatures and that could cause some spore issues.

Lettuce:

Butter

Supplies and demand are good. Quality is fair.

Green/Red Leaf

Supplies and quality are fair. The cold weather a couple of weeks ago really slowed down the crop and also affected quality. Due to the cold weather, we are experiencing slight yellowing and lighter weights. Yields also took a big hit, which means our supplies are lighter this week. Weights are in the 19-21lbs range.

Iceberg Lettuce

Numbers are steady to high and demand is down, due to cold weather back east. We are seeing signs of frost damage from two weeks ago.

Romaine

Supplies have returned to normal. Demand was very strong last week but has started to slow down early this week. Product is still recovering from the cold weather that hit a couple of weeks ago. Most of the romaine will continue to show epidermal peel and blistering, while some of the younger crops will have less defects.

Romaine Hearts

Demand and supplies are good.

Limes

Many more shipments have crossed into the U.S., causing prices to drop. The crop is dominated by 110- and 150-count sizes.

Napa

Supply and quality are good. Demand is fair.

Onions

Demand has continued to exceed supply, which is causing all sizes and colors to increase in price. Size profiles remain heavy to Jumbos and Colossals, with Medium onions remaining on the tighter side. White onions have become extreme in price, with very little supply available and this will likely continue through the remainder of storage season as the Northwest has a short supply. Reds remain more plentiful than other colors, and straight load deals exist out of both Idaho/Oregon and Washington. Typically, during this time, we begin to see Mexican product crossing, which usually creates downward pressure on pricing. However, because Mexico is keeping their supply for their local market, we are not seeing any increase in supply. We will likely not see Mexican onions cross through South Texas until the second week of February. Until this occurs, we will likely see incremental increases in price on all colors and sizes.

Oranges

We are picking in between rains and going with good volume of the new California navel crop and will continue with navels through April possibly May, 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. With our past rains that we have had the fruit is starting to size up and we are now peaking on 113's, 88's then 72's, so we have a good range in size on both grades. The sugars will continue to get better which have been around 12-13 brix, so fruit does eat good and will only get better in the coming weeks. We have been experiencing some cooler nights in the high 20's to low 30's which has helped to bring on the color and helps to firm up the fruit keeping it stronger, and also, we are done gassing and fruit will be of natural color. Once our days start to warm up, we will see the fruit start to puff and crease but hopefully we do not start to see that until March or so.

Parsley(Curly, Italian)

Supplies and quality are both good.



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Produce (continued)

Green Bell Pepper

EAST: Like a broken record, supply is still you guessed it, light in Florida. We don't anticipate and strong volumes coming into play over the next few weeks. All sizes are tight, including choice, but #1 big fruit is still the toughest to get. FOBs are high and steady. Quality is still fair to good, with softer walls and some stem issues reported. We recommend keeping a tighter inventory until quality straightens out.

WEST: New reports are in and it isn't pretty. Reports of bloom drop from the cold weather a few weeks ago has taken away more supply than expected. Additionally, some fruit is weaker, therefore staying on the vine longer to try to improve quality. Weaker fruit is more susceptible to bruising. FOBs are mostly steady week over week on all sizes.

Jalapeños (Chiles)

EAST: FL does not produce enough this time of year to make up for Mexico's current issues. Demand is high keeping upward pressure on FOBs. Quality is fair to good.

WEST: It's still critical in MX as growers try to rebound from the fall weather. Supply & FOBs are not expected to improve until at least mid-February. Quality continues to be fair at best on the entire chile category. We recommend keeping a tight inventory.



Red Bell Pepper

EAST: Despite the firm green pepper market, there is a good amount of red pepper now available mostly from offshore. FOBs are down again with good to excellent quality available. WEST: Despite the firm green pepper market, there is a good amount of red pepper now available from MX. FOBs are down again with good to excellent quality available.

Pineapple

Prices are low. Supplies are ample in Costa Rica and Mexico (into Texas), particularly 7- and 8-count sizes. Quality is average: fruit is firm, yet juicy, with sweet, slightly tangy flavor. Sugar levels range from 13 to 16 Brix.

Idaho Potatoes

Norkotah Supply is dwindling, and in the next month or so, we will be exclusively into Burbanks. Demand continues to exceed supply, particularly on 40-80ct potatoes. There are several factors that are leading to a pressured supply of russets in both Idaho and Washington. Europe has a very poor crop, which is causing increased export out of Washington, and some out of Idaho. Additionally, the crop failure on Midwestern potatoes due to combination of rain and freeze during the end of harvest, has sent dehydrators and processors to the Northwest. We anticipate a potential extreme market situation as we get into the late Spring and Summer months. Quality in Idaho is fair at best as they experienced their own challenges during the tail end of their harvest related to freeze and weather.

Radishes

Markets are steady.

Salad Blends

The market is unchanged; iceberg and romaine stocks are sufficient. Inspectors are closely monitoring finished cartons for chunks and core material 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 may continue, if it rains this week.

Spinach (Baby)

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

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Produce *(continued)*

Spring Mix

Prices have stabilized; supplies are increasing with higher temperatures in the region. Quality has improved.

Yellow Squash/Zucchini

EAST: Homestead is still seeing issues with yellow. Light volume and major quality concerns are resulting in continuous high yellow markets, but down slightly from previous reports. Honduras is starting to bring some zucchini into market with excellent quality which is driving down FOBs.

WEST: Supply is quickly loosening up. Zucchini is more readily available while yellow is still a little snug. There are still some quality concerns, but we are definitely seeing improvement.

TOMATOES EAST

Rounds

Florida's round production is down slightly due to cooler weather and quite a bit of rainfall. Prior sizing concerns have balanced out and there is a good spread and availability of all sizes. The pressure is being taken off Florida to fill the supply chain as Mexico's supply has increased like we previously talked about. Thus, FOBs are down on extra-large and large, while mediums remain steady. Quality has been excellent on crown picks, but as we move into later picks, we are seeing more fruit with wind scarring.

Romas

Supply continues to be light, but with Mexico sending great volume, the pressure is off Florida. There is a good range of sizing available as crops are in different stages of harvest. FOBs are steady to slightly down. Quality remains most excellent, however, there are some concerns of previous weather causing wind scars on some crops.

Grapes

Our Immokalee, Naples & Homestead crops are moving along nicely. FOBs are steady with good to excellent quality available.

Cherries

Things are steady on the cherry front. No changes in supply or prices for next week. Quality is mostly good. Some crops are showing lighter color than usual.

TOMATOES WEST/MEXICO

Rounds

With great weather, MX has hit a good stride and great supplies are crossing regularly. There is good volume available for big fruit, while 5x6 size is a little snuggier. As long as weather continues to be good, we expect good volume through February. FOBs haven't quite hit the minimum yet but are creeping that direction. Quality is excellent.

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

Good supply crossing daily is keeping FOBs steady. Quality is excellent.

Cherries

Good volume continues to cross Nogales daily. FOBs are steady with excellent quality available.

Watermelons

Prices remain elevated; availability is limited due to erratic weather. Supplies are shipping from Southern Mexico, increasing freight costs to the U.S. Quality is good: sugar levels are average.

