



MARKET TRENDS

FOR WEEK ENDING MARCH 1, 2019



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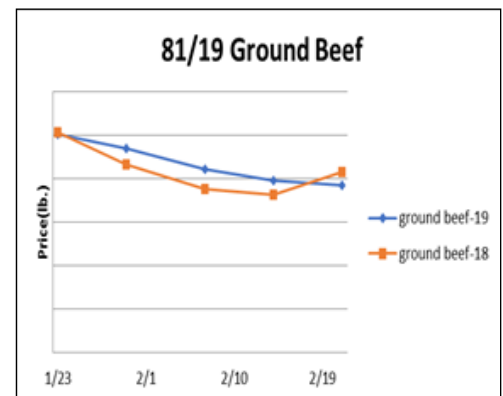
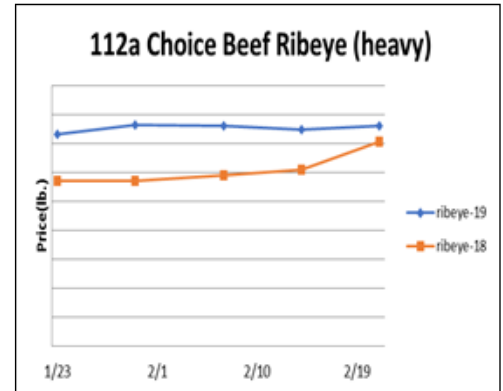
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Last week, beef production fell 4.5% from the week prior, but came in nearly even with last year, at 492.2 million pounds. Weekly average production schedules are expected to ease through the balance of February before escalating sharply from March well into the summer. But, lighter cattle carcass weights may temper those seasonal increases. Significant forward sales of middle meats, as well as beef 50s, pose continued risks for tight beef supplies (and higher prices) deep into the peak grilling season. Retail features of beef grinds have been active, and the lower price environment should encourage further activity.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Decreasing	Short	Lower
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)	Decreasing	Good	Lower
112a Ribeye (ch)	Increasing	Good	Higher
112a Ribeye (pr)	Decreasing	Good	Lower
114a Chuck , Shlder Cld(ch)	Decreasing	Good	Lower
116 Chuck (sel)	Decreasing	Good	Lower
116 Chuck (ch)	Decreasing	Good	Lower
116b Chuck Tender (ch)	Increasing	Good	Higher
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Decreasing	Good	Lower
121c Outside Skirt (ch/sel)	Decreasing	Good	Higher
121d Inside Skirt (ch/sel)	Decreasing	Good	Higher
121e Cap & Wedge	Decreasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Lower
168 Inside Round (ch)	Decreasing	Good	Lower
169 Top Round (ch)	Decreasing	Good	Lower
171b Outside Round (ch)	Increasing	Good	Higher
174 Short Loin (ch 0x1)	Increasing	Good	Higher
174 Short Loin (pr 2x3)	Increasing	Good	Higher
180 0x1 Strip (ch)	Increasing	Good	Lower
180 0x1 Strip (pr)	Increasing	Good	Higher
184 Top Butt, boneless (ch)	Increasing	Good	Higher
184 Top Butt, boneless (pr)	Decreasing	Good	Higher
184-3 Top Butt, bnls (ch)	Decreasing	Good	Higher
185a Sirloin Flap (ch)	Increasing	Good	Lower
185c Loin, Tri-Tip (ch)	Decreasing	Good	Higher
189a Tender (sel, 5 lb & up)	Increasing	Good	Higher
189a Tender (ch, 5 lb & up)	Decreasing	Good	Lower
189a Tender (pr, heavy)	Increasing	Good	Higher
193 Flank Steak (ch)	Increasing	Good	Lower
50% Trimmings	Increasing	Good	Lower
65% Trimmings	Decreasing	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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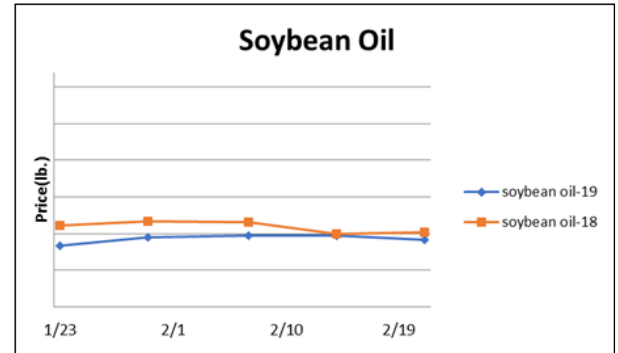
PERFORMANCE
FOODSERVICE



Grains

The total domestic corn production estimate for 2019/'20 was lowered modestly by the USDA in their February report. However, U.S. corn supplies are more than adequate and are influencing prices downward. Nearby corn futures have not traded appreciably below \$2.90 per bushel and for a notable period of time since April 2016.

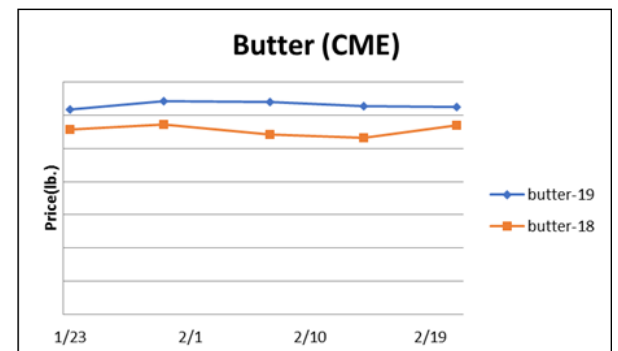
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Steady	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Higher
Distillers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



Dairy

The cheese markets have been firm. Cheese block prices are the highest since October and barrel prices are the most expensive since September. Harsh winter weather in parts of the U.S. have tightened milk supplies for cheese producers which has supported prices. Current U.S. cheese prices are still less costly for international buyers which is fueling exports. History says that the cheese markets can appreciate from now through early April. The spot butter market has been steady. Since 2014, the average move for spot butter prices from March through June was up 19.4%.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Lower
Cheese Blocks (CME)	Increasing	Good	Higher
American Cheese	Increasing	Good	Higher
Cheddar Cheese (40 lb)	Increasing	Good	Higher
Mozzarella Cheese	Increasing	Good	Higher
Provolone Cheese	Steady	Good	Same
Parmesan Cheese	Increasing	Good	Higher
Butter (CME)	Decreasing	Good	Higher
Nonfat Dry Milk	Decreasing	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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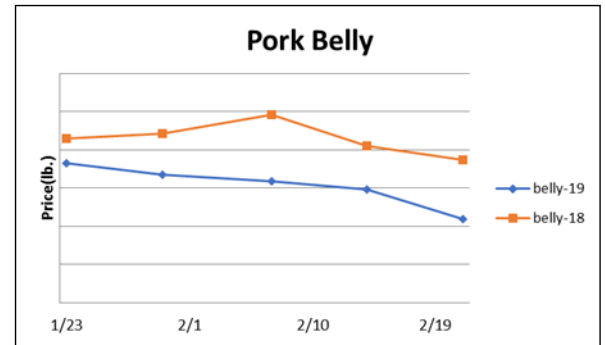
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Pork

Last week, pork production jumped 5.7% (yoy), with hog slaughter a whopping 2.5 million head for the second consecutive week. Increasing pork output has been problematic for the wholesale market, pressuring the USDA cutout to multi-year lows, down more than 17% year-over-year. Pork bellies have been in freefall mode breaking below the \$1.00 mark earlier this week. If the lower prices hold, that puts bellies near a 30% discount (yoy). Ham sales are expected to ramp up ahead of the Easter holiday, with prices languishing at favorable levels.

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)	Decreasing	Good	Lower
Loin (bone in)	Decreasing	Good	Lower
Babyback Rib (1.75 lb & up)	Decreasing	Good	Lower
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	Higher
72% Trimmings	Decreasing	Good	Lower



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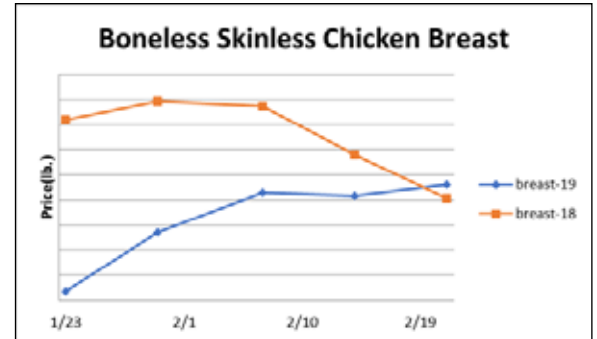
PERFORMANCE
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Poultry

For the week ending February 9th, chicken output was down 1.4% week-to-week but the six-week rolling average was up 2% (yoy). With USDA forecasting total production for the first half of 2019 at 1.1% higher, the industry appears poised to meet these modest gains. But as integrator margins improve with rising chicken prices, expectations are that production may begin to ramp up later into Q2. The tender/breast price spread is wide relative to history but is still under levels from 2018. Expect the price spread to narrow as breast meat prices climb versus tenders. Leg quarter prices remain lackluster, with key export partners noticeably absent from the market.

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



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



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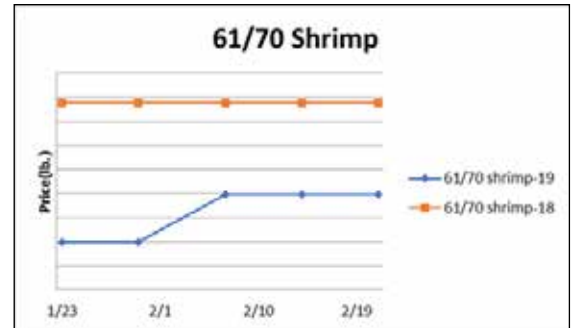
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Seafood

U.S. snow crab imports have been erratic during the last several months. In November, they were up 4% from the previous year but at historically inflated price levels. The Alaskan snow crab fishing season is progressing, and the Canadian seasons are near. Still, the Newfoundland harvest this year could be small causing elevated price levels to persist.

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	Decreasing	Good	Higher
42 lb. Linerboard-corrugated box	Decreasing	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

Nearby cocoa futures moved upward over the last week. Dry weather (drought) concerns are building in West Africa, the world largest cocoa bean growing region. The quarterly pivot model suggests that nearby cocoa futures could target the R1 at \$2,576 before April.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Decreasing	Good	Lower
Tomato Paste-Industrial (lb)	Increasing	Good	Higher
Coffee lb ICE	Decreasing	Good	Lower
Sugar lb ICE	Decreasing	Ample	Higher
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. This is an industry wide issue related to the cold weather.

WATCH LIST

- Melons (Honeydew)
- Mushrooms
- Sweet Potatoes and Yams

Apples & Pears

Golden Delicious and Granny Smith stocks are less abundant than other varieties due to strong demand. Autumn Glory, Braeburn, Envy, Honeycrisp, Jazz, Pacific Rose, and Pink Lady stocks are available. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 14 to 18 Brix. The Washington Bartlett season has ended; California supplies will hit the market in June. D'Anjou Pears are readily available, as are packer label Bosc stocks. Sugar levels range from 12 to 14 Brix.

Artichokes

Supply industry-wide is fair. Demand is fair and prices are lower.

Arugula

Supply is steady to fair. We may start to see mildew because of the rain last weekend.

Asparagus

After months of high prices, asparagus markets have fallen. Mexican supplies are plentiful. Quality ranges from good to excellent: spears are straight and firm with pleasantly bitter flavor.

Avocados

Markets are steady with some signs of strength. Mexico slowed down last week, limiting supplies, or at least harvesting less than they had been prior to Super Bowl. Promotions are expected to increase now that Valentine's day is over, and markets are still at a level that allow for good promotion. #2 markets are getting better as well. Smaller sizes 60 and smaller are the tightest in the industry.

Bananas

Supplies will be tight for the next 3-4 weeks. This lower volume should affect only market customers. Difficult growing conditions are affecting the stubbornness of the fruit. Fruit is taking longer than normal to ripen.

MARKET ALERT

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



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Produce (continued)

Beans

Warm weather has brought the beans on! There's plenty available and quality is good from the Lake, Homestead and other South Florida areas. Mainland Mexico also expects to have good supply and quality for at least the next few weeks, barring any weather issues.

Berries:

Blackberries

The market is stable. Supplies are adequate, but volume has begun to diminish. Quality is average: berries are deeply colored, juicy, and sweet. Sugar levels range from 12 to 13 Brix.

Blueberries

Prices are weak; Mexican and offshore stocks are abundant. Quality is good: berries are dark blue with a slight blush and sweet, yet tangy flavor.

Raspberries

Prices are steady; stocks are sufficient. Quality is good: rain and low temperatures continue to affect California production. Sugar levels range from 13 to 14 Brix.

Strawberries

The market is starting to ease. Quality is improving.

Bok Choy

Supply and quality are good.

Broccoli

The market is rising sharply. Abnormally low temperatures have slowed growth and decreased yields. Despite inclement weather, Arizona quality is good: discoloration and mildew are occasional problems being trimmed by harvesting crews.

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

The market is elevated; abnormally low temperatures have slowed growth and decreased yields. Quality ranges from poor to good: discoloration and uneven size are problems.

Celery

Prices will remain elevated through this week. Planted acreage is below-average this year. Quality is fair: growth cracking is becoming more prevalent.

Cilantro

Supply is improving. Quality is fair to poor.

Corn

Steady supply and good quality out of Florida and Mexico.



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Produce (continued)

Cucumbers

Honduras continues to roll along with steady cucumber production, particularly on the SS size. Volumes are light on selects and very light on cartons, as current pricing is right at the break-even point for growers. Overall quality is mostly good, although we are beginning to see some scarring on fruit that is from older fields. There are a few FL growers saying they may start during the 1st week of March, but most are on tap to begin in the 2nd or 3rd week. Despite cool weather slowing cucumber production in some areas, overall, Mexico has a good supply of product with nice quality and condition.

English Cucumbers

Supply has firmed up due to the last blast of cold weather to hit central Mexico. Very light supply out of the Northern Greenhouses. Markets should be firm for the next 2 to 3 weeks.

Eggplant

Florida doesn't have a whole lot of eggplant as crops just never quite recovered from the previous cool and rain they experienced. Quality is decent, but there have been considerable reports of scarring. We don't expect much change in volume until the 2nd or 3rd week of March. Meanwhile, Mexico's eggplant harvests are ramping up with better volumes and quality this week.



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 – 18's and 36's 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 next week, 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. We are seeing shortages in supply and higher prices

Green Onions

ESCALATED, Due to continued cold temps, the market will remain firm. Current supply is reduced because of cold weather.

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Produce (continued)

Honeydew

Starting to see better 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)

ESCALATED, 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 creating spores in the fields as well and we will hope that it is not to extensive on the clear rot.

Lettuce:

Butter

Supply and demand are good. Quality is poor due to weather related issues.

Green Leaf

Supply and quality are fair to poor. The cold weather this weekend will continue to impact quality. 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 is fair.

Iceberg Lettuce

Supply is lighter than normal due to cold weather. We can anticipate some freeze damage and other quality issues. We expect to see higher prices and slight shortages.

Romaine

Supply is below normal. Cold weather is predicted in the desert again this week, causing potential ice in our fields and delaying harvesting times. In addition, expect to see some peel and blister, quality is fair to poor.

Romaine Hearts

Demand is good. Supply and quality are fair to poor due to weather related issues.



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Produce (continued)

Limes

Prices are up; stocks will remain tight through March. Mexican lime shipments into the U.S. are lower than normal.

Napa

Supply and quality are good. Demand is fair.

Onions

Weather across the country has caused a lower demand which has now become equal to supply. This has caused the market to stabilize across the board. 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 out of both Idaho/Oregon and Washington.



Oranges

We have rain starting today and forecasted through Thursday, 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 .50-1" depending on who you listen to. 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.

Parsley(Curly, Italian)

Supply and quality are good.

Green Bell Pepper

New Spring fields are flushing in Florida, bringing a good number of bells to market this week. By no means is there an oversupply, but availability is at the best point the East has seen in months. Although there's a lot of bigger fruit, the full range of sizing is available as older fields continue to be harvested. Quality is just okay, as there is some scarring, bruising, and mis-shape due to prior weather. Mexico's Spring bell crops are running a little behind schedule due to cooler weather. Once weather conditions improve, there should be a nice flush of product available. Quality has been excellent & all pack styles are available, just not in large quantities.

Jalapeños (Chiles)

Hot peppers, for the most part, are at normal levels for this time of year with the exception of Jalapenos & Serrano's. While we expected improvements this month, it's now looking like it will be March before availability rebounds to more normal levels. Quality is all over the place as growers haven't fully recovered from past weather patterns. We're seeing internal decay, shoe polish, mixed sizes, and scarring on some crossings and nicer quality on others.

Red & Yellow Bell Pepper

Prices have inched up; stocks are tightening. There is a wide range of quality on the market: bruising, decay, and premature breakdown are issues.

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Produce (continued)

Pineapple

The market is weak. Volume is high; 7- and 8-count sizes are particularly ample. Sugar levels range from 13 to 16 Brix..

Idaho Potatoes

The Potato market continues to rise as demand and pricing have increased each week. Large cartons are extremely limited as more growers are moving to Burbanks. There is very little size in the Burbank crop which has put tremendous pressure on the Norkotah crop.

Radishes

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

Salad Blends

Prices are up. Iceberg and romaine stocks are limited throughout the industry due to low temperatures and rainy weather. 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.

Spinach (Baby)

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

Spring Mix

The market has jumped; volume is low. Quality is fair: the cold is affecting the delicate varieties in this mix.

Yellow Squash/Zucchini

New fields and improving weather conditions have brought better supply and quality on squash from Mexico. Florida's squash production is steady, but there's definitely not an oversupply. Farms from Homestead up to Plant City are in action this week, all with light supply/plantings. There's a big variance in the quality available on yellow squash- some is great, some is poor. Zucchini quality is very nice though. The Honduran squash that was coming in is in a gap right now. They should come back in with fruit about the same time that Florida's Spring plantings do...in 2-3 weeks.

TOMATOES

Florida's round tomato volume is expected to be light for the next few weeks as farms finish up late Winter crops and wait for Spring plantings to come online. Quality on this week's fruit is nice although there are still some concerns on product from the Homestead area from prior weather. The sizing profile has spread out with more small fruit available now. Roma availability is a little stronger this week with a variety of sizing and mostly good quality. As for grapes, production has lightened up but there's plenty available to meet market needs.

Mainland and West Mexico farms are also transitioning from Winter to Spring acreage on rounds and romas. Coupled with slightly cooler weather, the transition is expected to drop available volumes somewhat. Sizing is still on the large side with very little 5x6 and smaller rounds coming out of the fields. Grape tomatoes seem to be on a different track, as they keep coming in plentiful numbers this week.

Watermelons

The market is slightly lower than last week. Stocks are shipping from Southern Mexico and Central America at this time. Availability is increasing. Quality is good: sugar levels are average for this time of year.

