



# MARKET TRENDS

FOR WEEK ENDING APRIL 19, 2019

 **PERFORMANCE**  
FOODSERVICE

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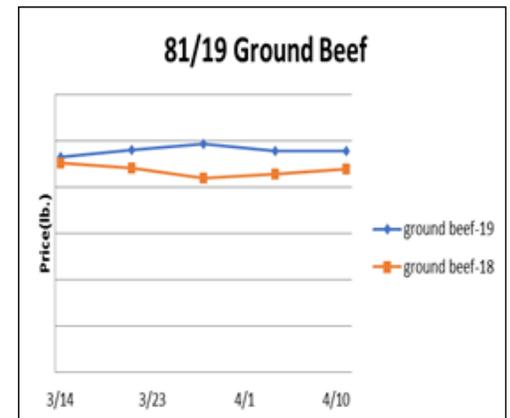
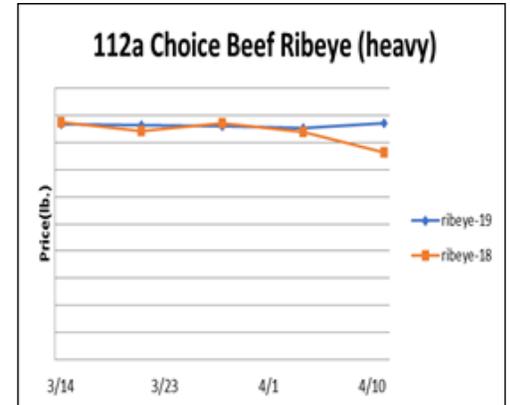
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## Beef, Veal & Lamb

Last week, larger cattle harvests (up 1%) but at lighter weights left beef output down 0.7% from the year prior. Lighter carcasses continue to temper total beef production, bolstering prices, with the Choice cutout up 3% (yoy). The largest price gains continue to emanate from the middle meats (ribs and loins) which are expected to remain firm into Easter. The beef markets usually accelerate into the May/June timeframe. Still, larger cow slaughter is expected to keep a lid on domestic 90% trim prices, with trade in the \$2.15 to \$2.20 range likely throughout the summer. Imported 90% beef trim prices are at a \$0.10 premium.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Steady	Short	Higher
Feeder Cattle Index (CME)	Increasing	Short	Higher
Ground Beef 81/19	Decreasing	Good	Higher
Ground Chuck	Increasing	Good	Higher
109 Export Rib (ch)	Increasing	Good	Higher
109 Export Rib (pr)	Increasing	Good	Higher
112a Ribeye (ch)	Increasing	Good	Higher
112a Ribeye (pr)	Decreasing	Good	Higher
114a Chuck , Shlder Cld(ch)	Increasing	Good	Higher
116 Chuck (sel)	Decreasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Higher
116b Chuck Tender (ch)	Decreasing	Good	Lower
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Increasing	Good	Lower
121c Outside Skirt (ch/sel)	Decreasing	Good	Higher
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Decreasing	Good	Higher
167a Knuckle, Trimmed (ch)	Decreasing	Good	Higher
168 Inside Round (ch)	Decreasing	Good	Lower
169 Top Round (ch)	Increasing	Good	Higher
171b Outside Round (ch)	Decreasing	Good	Higher
174 Short Loin (ch 0x1)	Increasing	Good	Higher
174 Short Loin (pr 2x3)	Decreasing	Good	Higher
180 0x1 Strip (ch)	Increasing	Good	Higher
180 0x1 Strip (pr)	Decreasing	Good	Higher
184 Top Butt, boneless (ch)	Decreasing	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	Higher
185c Loin, Tri-Tip (ch)	Increasing	Good	Higher
189a Tender (sel, 5 lb & up)	Increasing	Good	Higher
189a Tender (ch, 5 lb & up)	Decreasing	Good	Higher
189a Tender (pr, heavy)	Decreasing	Good	Higher
193 Flank Steak (ch)	Increasing	Good	Lower
50% Trimmings	Increasing	Good	Lower
65% Trimmings	Decreasing	Good	Lower
75% Trimmings	Increasing	Good	Higher
85% Trimmings	Increasing	Short	Higher
90% Trimmings	Steady	Short	Lower
90% Imported Beef (frz)	Increasing	Good	Higher
95% Imported Beef (frz)	Increasing	Good	Higher
Veal Rack (Hotel 7 rib)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Higher



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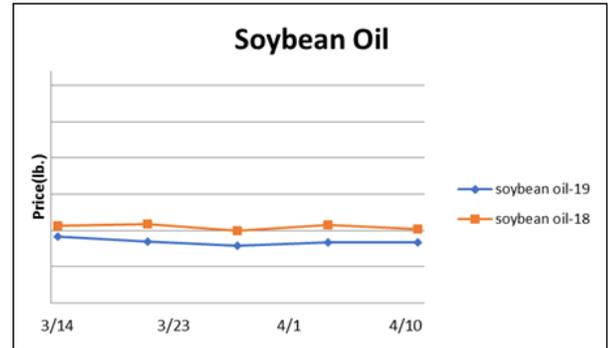
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## Grains

The USDA is estimating the U.S. winter wheat crop conditions at 60% of the crop in either good or excellent condition which is the best rating for this time of the year since 2012. Thus, good crop yields are anticipated. This could mitigate the upside potential for the various wheat markets during the spring.

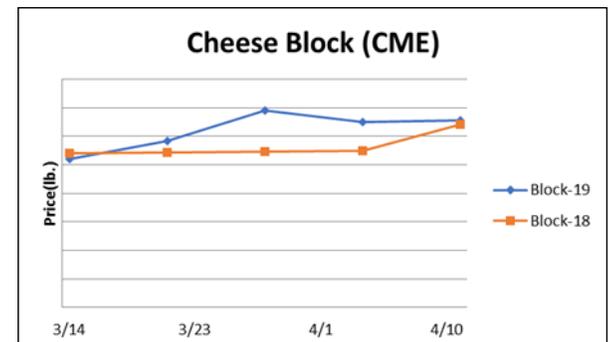
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Increasing	Good	Lower
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Steady	Good	Lower
Distillers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



## Dairy

The spot butter market continues to be steady, pricing near \$2.250 for almost five weeks. February butter production was down 2.9% from the prior year. Still, higher class IV milk prices (vs. class III milk) are pushing more milk (cream) to butter producers which should boost stocks. This is likely to temper seasonal price gains for butter that usually occur in the spring. The cheese markets remain firm due in part to better demand and solid exports. February cheese output was .5% better than the prior year. Yet, the cheese block market likely has only modest upside potential from here.

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



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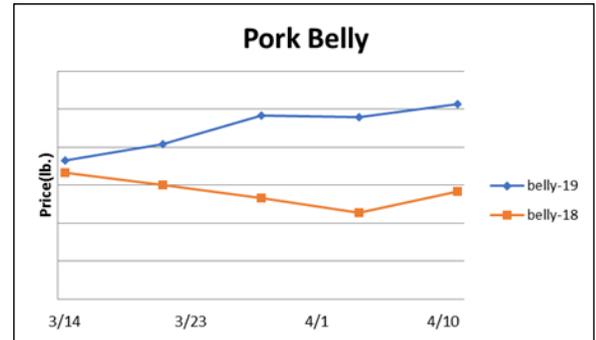
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## Pork

Weekly pork production was down modestly from the week prior, but sizable year-over-year production gains remained, up 5% from 2018. Larger pork output pressured prices down through late February, but more aggressive interest as of late has pushed the USDA pork cutout to its highest (for last week) since 2014. Sharp price increases on the hams and bellies were the reason for the USDA move, with belly prices still near 45% over a year ago. Look for bellies to retreat from these high price levels, but a rise is still projected during the summer.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Increasing	Ample	Higher
Sow	Increasing	Ample	Higher
Belly (bacon)	Increasing	Good	Higher
Sparerib(4.25 lb & down)	Increasing	Good	Higher
Ham (20-23 lb)	Decreasing	Good	Higher
Ham (23-27 lb)	Decreasing	Good	Higher
Loin (bone in)	Increasing	Good	Higher
Babyback Rib (1.75 lb & up)	Increasing	Good	Higher
Tenderloin (1.25 lb)	Decreasing	Good	Lower
Boston Butt, untrmd (4-8 lb)	Increasing	Good	Higher
Picnic, untrmd	Increasing	Good	Higher
SS Picnic, smoker trm box	Increasing	Good	Higher
42% Trimmings	Increasing	Good	Higher
72% Trimmings	Increasing	Good	Higher



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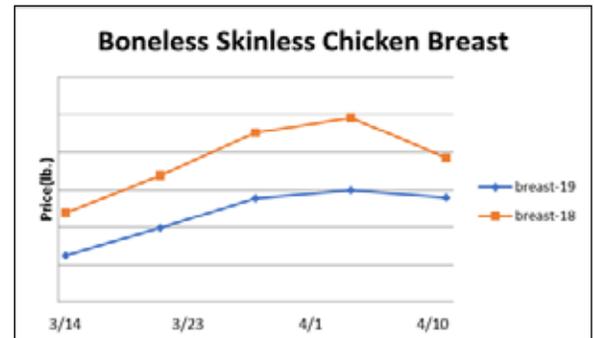
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## Poultry

For the week ending March 30th, broiler production was down modestly from the week prior, but moved 1.7% higher than a year ago. Slightly larger production schedules have pushed the six-week moving average up 1.1%, and given improving producer margins, further chicken output gains are expected heading deeper into Q2. Despite breaking modestly, the weekly average wing price remains in the lower \$1.90s, but further seasonal declines are expected moving forward. Breast meat prices are on the rise, up sharply from early March, but further price gains may be tough to come by due mostly to larger chicken production expected this spring and summer.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Increasing	Good	Lower
Wings (jumbo cut)	Decreasing	Good	Higher
Wing Index (ARA)	Increasing	Good	Higher
Breast, Bnless Skinless NE	Decreasing	Good	Lower
Breast, Bnless Skinless SE	Decreasing	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	Higher
Thighs, Bone In	Decreasing	Good	Higher
Thighs, Boneless	Decreasing	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	Steady	Short	Lower
Liquid Egg Whites	Steady	Short	Lower
Liquid Egg Yolks	Steady	Short	Lower
Egg Breaker Stock Central	Decreasing	Short	Lower



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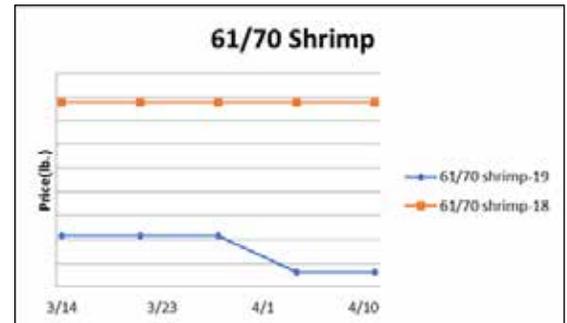
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## Seafood

U.S. snow crab imports during February were 42.3% more than the previous year. But world snow crab supplies are expected to remain limited for the next several months. The 2019 Newfoundland snow crab quota is 26,894 metric tons, down 7.2% from last year and the smallest in recent history. This could underpin the snow crab leg markets this spring.

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	Higher
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
<b>WOOD PULP (PAPER)</b>			
NBSK- Paper napkin	Steady	Good	Higher
42 lb. Linerboard-corrugated box	Steady	Good	Higher
<b>PLASTIC RESINS (PLASTIC, FOAM)</b>			
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	Feb-19	Jan-19	Dec-18
Beef and Veal	Increasing	Increasing	Decreasing
Dairy	Decreasing	Increasing	Increasing
Pork	Decreasing	Increasing	Decreasing
Chicken	Increasing	Decreasing	Increasing
Fresh Fish and Seafood	Decreasing	Increasing	Increasing
Fresh Fruits and Vegetables	Decreasing	Increasing	Increasing

## Various Markets

Nearby international sugar (#11) futures are higher since last week and are up 6.3% year-to-date (vs. 2019). More Brazilian sugarcane is being used for ethanol production instead of being directed for consumption due to the high petroleum markets. Global sugar price could remain supported.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Steady	Good	Higher
Tomato Paste-Industrial (lb)	Steady	Good	Higher
Coffee lb ICE	Increasing	Good	Lower
Sugar lb ICE	Decreasing	Ample	Higher
Cocoa mt ICE	Increasing	Short	Lower
Orange Juice lb ICE	Decreasing	Good	Lower
Honey (clover) lb	Steady	Good	Lower



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## Produce

### Market Overview

We are currently in the beginning phases of transition. We are seeing some quality issues with product out of the desert region mainly due to bugs; we will begin to see improvement now and into the next weeks as we transition fully into Salinas. Celery is still in a very EXTREME situation.

### WATCH LIST

- Mushrooms
- Sweet Potatoes and Yams

### Apples & Pears

The Golden Delicious and Granny Smith markets are inching up; storage stocks are tight. Braeburn volume will be depleted by late April. Washington Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious Apples are available. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 14 to 18 Brix.

The Pear market is level. D'Anjou Pears and Bosc are available. Sugar levels range from 12 to 14 Brix. California Bartlett's will become available in June.

### Artichokes

Supply industry-wide is fair. Demand is fair and prices are steady to higher.

### Arugula

Supply is steady to good.

### Asparagus

High markets persist. Mexican growers are in transition from Baja to Central Mexico. Quality is fair: expect better quality when production has moved.

### Avocados

Prices are expected to remain elevated into June, when summer crop volume increases. Mexico's winter season is wrapping up; stocks are limited. New crop California volume is low but increasing. Quality is very good: oil content is highest in Mexican product.

### Bananas

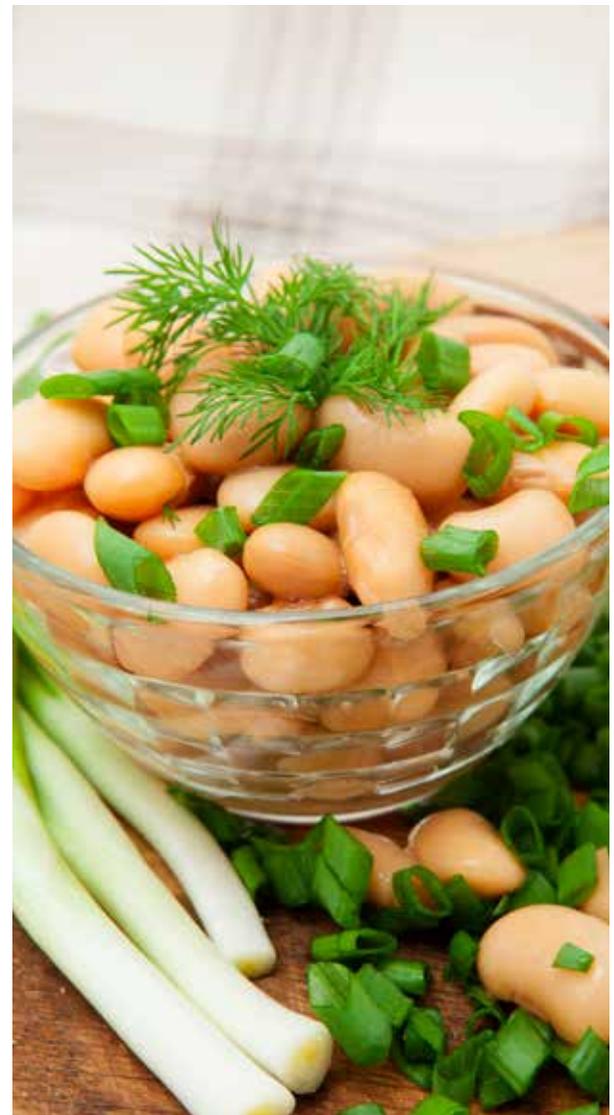
Banana supplies have transitioned back to "normal" with on-time vessels and arrivals from the tropics. Fruit quality remains good with no real changes in the short term.

### Beans

Round beans are readily obtainable with excellent quality available.

### MARKET ALERT

- Avocados - **ESCALATED**
- Bell Pepper (Green) - **EXTREME**
- Cabbage (Red) - **ESCALATED**
- Celery - **EXTREME**
- Limes - **ESCALATED**
- Onions (White) - **EXTREME**



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## Produce *(continued)*

### **Berries:**

#### **Blackberries**

Prices are stable. The Mexican season is ending, but California production is increasing. Quality is very good: berries are deeply colored, juicy, and sweet. Sugar levels range from 12 to 13 Brix.

#### **Blueberries**

The market is inching up. The California season is at its peak; Mexican stocks are starting to tighten. Quality is very good: fruit is plump and juicy.

#### **Raspberries**

The market is unchanged; stocks are sufficient. Quality is very good: berries are plump and juicy with sweet flavor. Sugar levels range from 13 to 14 Brix.

#### **Strawberries**

California prices are steady. Supplies are increasing to meet Easter and Mother's Day demand. Mexican stocks are tight; many growers have ended harvesting for the season.

#### **Bok Choy**

Supply for 50lb are in short supply and prices are up.

#### **Broccoli**

Prices are level; stocks are plentiful even though the seasonal harvesting transition from the Arizona/California desert north to the Salinas Valley is underway. Quality is very good: yellow discoloration is a slight problem.

#### **Brussels Sprouts**

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

#### **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, tight on 12's and very few 15's. We expect continued good volumes going forward mainly larger fruit and quality should hold good as well. We are anticipating starting in the Imperial valley around the first week of May and will have good volume by around the 10th.

#### **Carrots**

Carrots are improving.

#### **Cauliflower**

Prices are steady. Harvesting is in transition from the Arizona/California desert region to the Salinas Valley. Quality is excellent.

#### **Celery**

Expect high celery prices and tight supplies through May 2019. The Salinas Valley is on schedule to start harvests in early June; stocks will increase at that time.

#### **Cilantro**

Quality is improving, and supply is good.

#### **Corn**

The market ticked up a tad, but there is still good supply and good quality out of Florida and Mexico.

#### **Cucumbers**

EAST: South FL is the main player with crops located on the coasts, Immokalee, & Estero. FOBs are steady to feeling some downward pressure as there is a good supply available. Older crops have been through some weather, so look for quality concerns in the form of scarring. New crops are shaping up nicely.

WEST: Following suit of other veg, Sinaloa is winding down and Sonora is ramping up. There have been some early quality concerns from Sonora, but these are expected to be worked out as harvests pick up. Also, Baja's volume is ramping up as well with good quality available. FOBs are steady to just slightly down.



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## Produce (continued)

### English Cucumbers

There are steady supplies available through Nogales. Volume deals are being made.

### Eggplant

EAST: Volume has perked up with new acreage coming into play. FOBs are trending down, but buyer beware of the "deal". Older crops are showing signs of poor quality, while new crops is shaping up better.

WEST: Good volume is available with FOBs steady. We expect good supplies for the 7-10 days with 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 smaller fennel this week - 18s and 24s 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, Peru and Thailand.

### Grapes

We are still receiving Chilean grapes on both coasts, and the marketing order goes into effect on April 15th which volumes will slow down after that date as the fruit must make US #1 upon arrival in order to stay here in the states. The overall quality has been good this year with several new varieties as well. Overall volumes were down about 20% versus last year which has kept the market fairly strong. The reds seedless will probably start to ease up in price and the Greens are definitely rising now as this is the storage fruit and typically after the marketing order very few greens come into the states. We are expecting Mexico and Coachella Valley to start about 7-10 days later than normal so around Mid-May for the start date in those regions. With that being said we will have to depend on the Chilean fruit to bridge that slight gap. The overall Mexico crop is a big one so once we start there, we will have plenty of volume going forward.

### Green Cabbage

Supply is good with available loading through Texas.

### Red Cabbage

ESCALATED: Supply continues to be light.

### Green Onions

Demand, supply and quality are good.

### Honeydew

We have better supply we are going out of Mexico with better volumes but not overwhelming volume. The fruit quality out of Mexico is good with some lots showing heavier scarring. 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. We will start in the Imperial Valley around May 10th and volumes will continue to increase after that.

### Jicama

Steady supply crossing through Texas.

### Kale (green)

Supply is steady.

### Lemons

We are going with heaviest volume here out of Dist. 1 (Central Valley) and have started to pick some Dist. 2 (Coastal Regions) fruit, just primarily size picking to relieve the trees of some stress. We are peaking on the big sizes and 165's and smaller are getting pretty snug and market much stronger and will continue to see this heading into the summer due to all the rains, fruit has been growing and peaking on 95's, 115's. The overall color is excellent as well as juice content, the warmer weather does have an effect on the fruit. 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, but it is inevitable, and we are doing all we can to help slow the spores down in the field and in the packinghouse.



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## Produce (continued)

### Lettuce:

#### Butter

Supply is poor, and quality is fair.

#### Green/Red Leaf

Supply is slightly above normal. We are seeing a little bit of thrip damage and bug pressure in our desert growing region. As of right now, we are split 70/30 between growing regions. Salinas Valley crop is clean; the desert will stop Wednesday, 4/10. Demand is good, and weights are in the 18-20lbs range.

#### Iceberg Lettuce

Yuma is officially finished, and we will be in Huron only for this week. Please load all orders over four pallets in Huron. Quality in Huron is very good, showing strong texture with good weights and color. The market seems to be steady, with the potential to get active over the weekend due to increased Easter demand.

#### Romaine

Supply is right on budget. Quality is good and is clean, with very good texture. Fields in the Salinas Valley are aren't quite full, but we have fully transitioned from the desert. Weights are hovering around 34-36lbs.



### Romaine Hearts

Supply this week is normal. Quality is great and is clean. All romaine hearts have officially transitioned from the desert. Weights on the 12x3's have been in the 21-23lb range, with the 48ct weighing 27-31lbs.

### Limes

Prices are starting to climb; Mexican crossings are down this week. Quality is very good.

### Napa

Supply and quality are fair.

### Onions

Onions have leveled off and we are starting to see relief on pricing. Texas will began shipping some new crop Onions this week, and Mexico is still trickling some supply in. Because white onions remain extreme in price, they are continuing to buy some domestic yellows for export, but it has calmed down as well. We should see the market settle out close to where we are now, as more Idaho guys will finish up in the coming weeks, while Texas adds more supply back on to the market to make up for this loss of volume. The Imperial Valley crop is looking like a start date of April 22nd. There are varying reports about how much volume they will be bringing to market, but some reports are showing they are down 30%-40%. While we certainly want guys to stay ahead of the market, we need to be careful not to get too long as shelf life will be abbreviated this time of year.

White Onions: EXTREME White onions are extreme as supply is very limited. Mexican white onions are the only source at the moment with the Northwest crop finishing their white supply early. We do not expect to see relief on whites until early to mid-May.

### Oranges

Weather is good going forward with no rain in the forecast, warmer temperatures will be coming our way. We are experiencing some clear rot and also puff and crease in most blocks showing up and will continue to get worse as our weather warms up, just lots of moisture in the ground. The overall color is full, and the fruit is eating great, and will only get better once the sun comes out as the water does leach out some of the sugar. We should have navels available through May and possibly into June but will see how the quality holds up. We will start some Valencia's in about 3 weeks as well.

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## Produce *(continued)*

### Parsley(Curly, Italian)

Quality is fair to good. Supply is steady.

### Green Bell Pepper

EAST: FL's volume has been light, but consistent. South Florida will pick the last of its crown picks this week but will continue to harvest for another few weeks, followed by Plant City. At this time, we do not expect a gap barring any weather or major disruptions. There is a healthy mix of sizing available with FOBs staying fairly steady. Quality is good for now but expect a decline as farms move into later picks.

WEST: MX's situation is quite messy. Sinaloa is winding down with fair quality leftover and new crop Sonora has decent quality but limited supplies. Meanwhile, California is running behind schedule and will not be starting for another 3 weeks or so. With the fragmented market come fragmented FOBs, however, the general consensus is upward pressure.

### Jalapeños (Chiles)

EAST: Status quo here. This is the eastern region's light supply time of year. FOBs are steady with good quality available. Look for new crop to start from Plant City in about 2 weeks.

WEST: April is expected to have excellent supply from multiple growing regions. FOBs are affordable with excellent quality available at your fingertips.



### Red & Yellow Bell Pepper

EAST & WEST: Production from MX is steady with Canada slowing coming in the mix and will continue to improve through April. We are still experiencing some green cast, but it is steadily improving. FOBs having rebounded yet, but we do expect them to start to taper downward as Canada increases. Quality is mostly good.

### Pineapple

Prices are steady. Supplies are adequate, but demand is strong due to the upcoming Easter holiday. Quality is very good: fruit is juicy and tangy. Sugar levels range from 13 to 16 Brix.

### Idaho Potatoes

Potatoes have also leveled off for a bit as decreased demand has caught some growers up. We still expect the market will pick back up and begin to steadily increase every few weeks. The majority of the strength is occurring on 40-70 counts, and we are now seeing 80s tighten up some as well. The Norkotah supply continues to dwindle throughout the state, and the Burbank size profile is small. As we continue to lose Norkotah supply and get deeper into Burbanks, we will continue to see the large size cartons increase in price and garner a premium. We may see a big disparity in price this season between 90s and 100s and larger size count cartons. No. 2 potatoes are becoming more plentiful as well since Burbanks generate more of this grade than Norkotahs do. We are expecting an active market this Summer as other growing regions have a much more limited crop, and the Idaho supply is believed to be down.

### 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 low. Iceberg and romaine stocks are ample. Quality is good. Inspectors are closely monitoring finished cartons for the highest quality product to achieve the best packs.

### Snow and Sugar Snap Peas

Supply is tight, quality is good, demand should be increasing.

### Spinach (Bunched)

Quality and supply are good.

### Spinach (Baby)

Supply and quality are good.

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## Produce (continued)

### Spring Mix

Prices are level; volume is average. Quality is very good: discoloration and mildew are minor issues.

### Sweet Potatoes and Yams

WATCH LIST: Hurricane Florence damage, coupled with heavy rains over the winter months has driven down supply. We do not anticipate any change as most all regions and weather have magnified the short year's issues with availability. We anticipate pricing will only rise further come summertime.

### Yellow Squash/Zucchini

EAST: The spring crop is in full swing with squash coming from Homestead, Immokalee & Plant City. FOBs remain low. Quality has been good lately, but scarring is still a major issue on yellow.

WEST: Mexico's production is transitioning from Sinaloa to Sonora. Sinaloa is still shipping but quality is declining quickly, so this may end sooner rather than later. Quality from Sonora is much better, but still have some wind scar on yellow. FOBs continue to remain low.

## TOMATOES – EAST

### Rounds

As the southern Immokalee season comes to a close, look for our new crops to begin out of Estero & Palmetto/Ruskin over the next 7 days or so. Sizing is currently spread fairly evenly, however, new crop is looking to lean heavier on the big fruit size. For now, FOBs are steady, but we could see an inverted market in the next few weeks. Older crop is showing some concerns with scarring & misshapen fruit, but Lipman's new crop Crimsons are looking more beautiful than ever.



### Romas

As the southern Immokalee season comes to a close, look for our new crops to begin out of Estero & Palmetto/Ruskin over the next 7 days or so. Sizing is heavier towards the smalls while bigger fruit is less bountiful. FOBs are reflective of the sizing availability with XL moving up. Quality is good to excellent.

### Grapes

Florida's grape production is moving along strong. FOBs are steady with excellent quality available.

### Cherries

Yields are steady, with enough supply to meet demand. FOBs are steady week over week with good quality available.

## TOMATOES – WEST/MEXICO

### Rounds

Mexico's mature green and vine ripe harvest is expected to remain steady for the next couple of weeks and will start to wind down closer to first week of May. While good supply is available, it is in no way a bumper crop. Warmer weather has spurred fruit to mature a little faster, so big fruit is tighter as we move into next week. Quality is mostly good; however, we continue to see soft be the biggest concern from the region.

### Romas

Great supply is still readily available from Western Mexico. Bigger fruit is a bit snuggier and FOBs are reflective of that, with XL moving up. Quality is mostly good, but in areas where there are big temperature swings, puffiness is a concern.

### Grapes

Current volume is still adequate but look for supplies to start to decline over the next 10-14 days. FOBs are steady to slightly down. Quality is fair, so we recommend keeping inventory tight.

### Cherries

Fairly good volume continues to cross daily. FOBs are steady; however, quality continues to be a struggle, with fruit poor to fair at best. We recommend keeping your inventory snug until quality improves.

### Watermelons

Prices are up; stocks are tightening. Quality is good: fruit is juicy and bright red. Sugar levels are average for this time of year.