



# MARKET TRENDS

FOR WEEK ENDING APRIL 26, 2019



# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

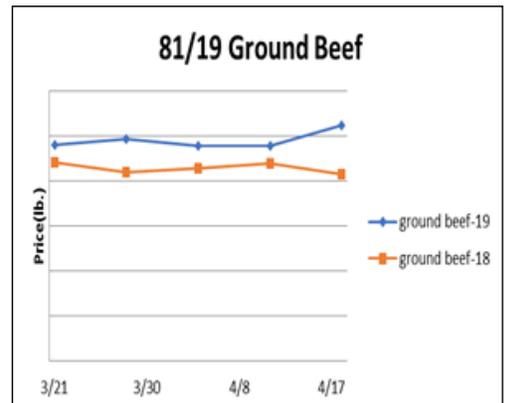
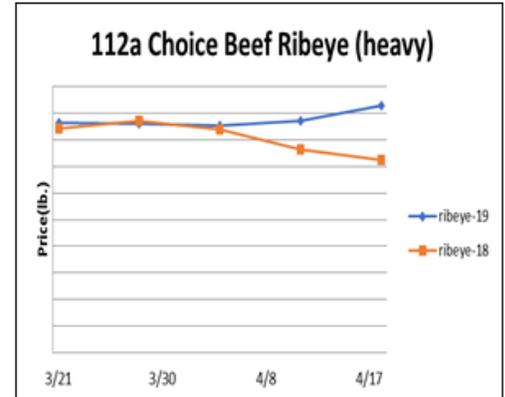
**PERFORMANCE**  
FOODSERVICE



## Beef, Veal & Lamb

Last week, cattle harvests jumped sharply, coming in at 638,000 head, the largest of the year thus far, and the second 630+ head harvest of 2019. Packers appear to be putting the pedal to the metal on production heading into late April, but boxed-beef sales volumes have been interestingly light. Across the past four weeks, total beef sales volumes are running 7.8% below year ago and 3% below the three-year average. But beef prices remain elevated. Expect prices to continue higher into May/June, with Choice middle meats leading the charge higher and trim and grind prices increasing as well.

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



# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

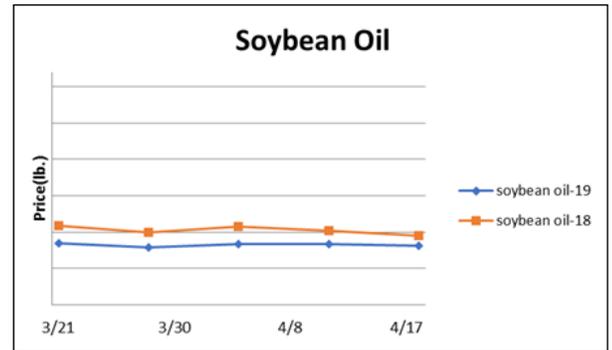
**PERFORMANCE**  
FOODSERVICE



## Grains

Wet conditions are limiting the early corn planting season in the U.S. As of April 14th, just 3% of the crop was in the ground which is modestly behind the five year average for the date. Although planting delays aren't necessarily bad news for acreage or crop yields, they could underpin corn prices in the near term.

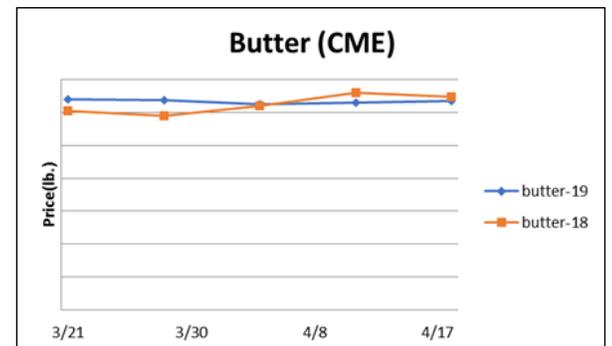
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Lower
Crude Corn Oil, lb	Increasing	Good	Higher
High Fructose Corn Syrup	Decreasing	Good	Lower
Distillers Grain, Dry	Decreasing	Good	Lower
Crude Palm Oil, lb BMD	Decreasing	Good	Lower
HRW Wheat, bushel	Decreasing	Good	Lower
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 CME cheese markets have been range-bound in recent weeks. U.S. milk output is seasonally increasing and should peak sometime next month. But that may not necessarily translate to lower cheese prices. The international cheese markets have been on the rise due to shortened production. And history shows that the CME cheese block market has averaged higher in May from April in three of the last four years. The CME butter market has been fairly steady as of late as well. World butter prices are trending upward which could pressure the U.S. market in the coming weeks.

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



# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

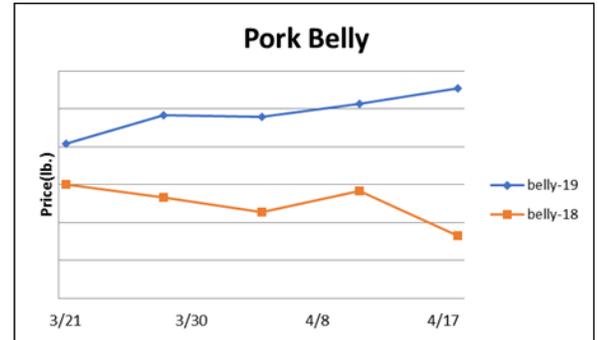
**PERFORMANCE**  
FOODSERVICE



## Pork

As pork packer margins ease, packers have pulled back on production. Recent winter storms have helped validate some of the reason for slowing production. Last week, pork production was down 3% from the week prior and just 0.5% over last year. The cutout remains well supported, up 27% from last year. Belly prices, in the mid-\$1.60s, are up more than 80%. Changing international meat flows are altering availabilities and are expected to keep excess product off the domestic market during the next several months. This may underpin pork prices.

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)	Increasing	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)	Increasing	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



# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

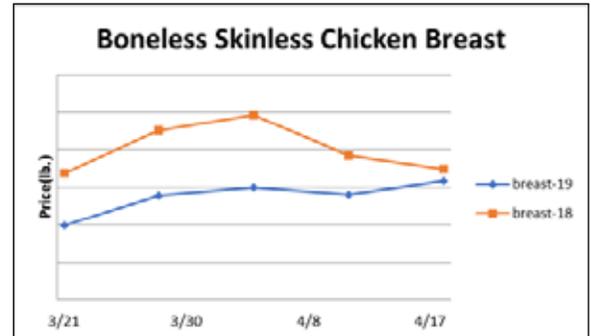
**PERFORMANCE**  
FOODSERVICE



## Poultry

For the week ending April 6th, total chicken production was up 3.5% from last year, but on a six-week rolling average basis, production is up just 1.9%. The largest gains have been noted on the 7.76lb and up category, running 10.2 percent over last year. Heading into late spring, recent chick placement data indicates modest growth, at best. The wing index remains choppy in the mid-\$1.90s, a record high for April, but is expected to ease moving forward. Breast meat continues to struggle to gain much traction and may be in the process of putting in an early seasonal top. Solid exports could support the leg quarter markets throughout the spring.

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



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

# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

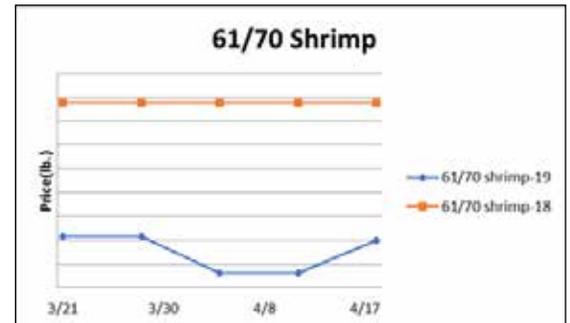
**PERFORMANCE**  
FOODSERVICE



## Seafood

The shrimp markets continue to track below 2018 levels. This is despite shrimp imports during January that were well below, 11.7%, the previous year. The high value of the U.S. dollar and the perceived slowing of the world economy are expected to fuel solid U.S. shrimp imports during the next several months. This could temper the upside in the shrimp markets.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Decreasing	Good	Lower
Shrimp (61/70 frz)	Increasing	Good	Lower
Shrimp Tiger (26/30 frz)	Increasing	Good	Lower
Snow Crab, frz	Increasing	Good	Higher
Tilapia Filet, frz	Decreasing	Good	Higher
Cod Filet, frz	Decreasing	Good	Higher
Tuna Yellowfin, frsh	Decreasing	Good	Lower
Salmon Atlantic Filet, frsh	Increasing	Good	Higher
Pollock Filet, Alaska, frz	Increasing	Good	Higher



# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

**PERFORMANCE**  
FOODSERVICE



## Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
<b>WOOD PULP (PAPER)</b>			
NBSK- Paper napkin	Decreasing	Good	Higher
42 lb. Linerboard-corrugated box	Decreasing	Good	Higher
<b>PLASTIC RESINS (PLASTIC, FOAM)</b>			
PS-CHH-utensils, cups, to-go cont.	Increasing	Good	Lower
PP-HIGP-heavy grade utensils	Decreasing	Good	Lower
PE-LLD-can liners, film, bags	Steady	Good	Lower

## Retail Price Change from Prior Month

Description	Mar-19	Feb-19	Jan-19
Beef and Veal	Increasing	Increasing	Increasing
Dairy	Increasing	Decreasing	Increasing
Pork	Increasing	Decreasing	Increasing
Chicken	Decreasing	Increasing	Decreasing
Fresh Fish and Seafood	Increasing	Decreasing	Increasing
Fresh Fruits and Vegetables	Increasing	Decreasing	Increasing

## Various Markets

Arabica coffee futures this month have fallen near the lowest levels since the fall of 2004. Ample world coffee supplies and a deflated value of the Brazilian real continue to weigh on the coffee markets. But the downside price risk from here is likely minimal.

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



# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

**PERFORMANCE**  
FOODSERVICE



## Produce

### Market Overview

We are currently in the middle phase of transition. We are continuing to see 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
- Squash (Italian and Yellow)
- 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.

**Pears** - The Anjou, Bosc, and red pears are available, and we will have good supply of US#1 pears available through about the 1st of June. The pear market has been lower this season due to additional supply.

### Artichokes

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

### Arugula

Supply and quality are good.

### Asparagus

Growers have good supply. Quality is good and steady.

### Avocados

**ESCALATED** We are continuing to experience a very active avocado market as we approach Holy Week. We do not expect any harvesting of fresh avocado in Mexico through the rest of the week, and we have seen the USDA quotes react with price increases overnight due to light crossing and low inventories stateside. We should see production ramp back up late next week but expect the markets to remain active through the end of the month.

### 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.

### MARKET ALERT

- **Avocados - ESCALATED**
- **Cabbage (Red) - ESCALATED**
- **Celery - EXTREME**
- **Limes -ESCALATED**
- **Onions (White and Red) - EXTREME**



# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Beans

There have been several Florida areas harvesting beans for the past few weeks (South FL, Lake area, Plant City area) and supply has been over the top. Some growers, particularly in the southern areas, harvested what they had sold, then plowed under remaining fields due to low market prices. We should see volume drop a bit next week as the south finishes up. Although there seems to be plenty of product in the ground now, depressed market prices could throw a wrench in supply. The West also has multiple areas in both Mexico and California in production and expects good supply for the immediate future. Quality is best from newer fields and areas.

### Berries:

#### Blackberries

The market is level. The Mexican season is nearly over, yet California supplies are becoming more abundant. Quality is very good: berries are deeply colored, juicy, and sweet. Sugar levels range from 12 to 13 Brix.

#### Blueberries

Prices are rising. The California season is past its peak; Mexican supplies are limited. Quality is very good: fruit is plump and juicy.

#### Raspberries

Prices are stable; supplies are adequate. Quality is very good: berries are plump and juicy with sweet flavor. Sugar levels range from 13 to 14 Brix.

#### Strawberries

The California market is level; volume is rising due to recent warm weather. The Mexican season has ended. Berry size is dominated by medium to large fruit. Quality is very good: recent strong winds caused some scarring, but harvesting crews are culling damaged fruit.

#### Bok Choy

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

#### Broccoli

The market is weak; supplies are ample. Quality is very good: yellow discoloration and mildew are occasional problems.

#### Brussels Sprouts

Very light availability this 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, 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. Supply now available in Georgia as well.

### Cauliflower

Supply will be light this week.

### Celery

EXTREME We will have light volume from Mexico this week. The weather has warmed up slightly, but sizing is still a little smaller than we would like out of Mexico. Extremely high, open-market prices.

### 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.



# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

**PERFORMANCE**  
FOODSERVICE



## Produce *(continued)*

### Cucumbers

Cucumber volume out of Mainland Mexico is still increasing and supply is plentiful. Some growers have been struggling with quality, but it seems to be getting better. Baja farms are also in the mix with good quality and more volume on the way. With the east coast, west coast and Plant City in production, there are also plenty of cucumbers in Florida! Overall quality has been good. We've seen light scarring from some growers, but it's not been a real issue yet. There are a few late crops planted in South Florida that will harvest during the first two weeks of May, but most southern farms will be wrapping up by then.

### English Cucumbers

There are steady supplies available through Nogales.

### Eggplant

Florida's eggplant numbers are steady but lighter than expected, as yields seem to be down this season. Quality is pretty solid, but there have been some scarring concerns reported. Mexico farms are steady as she goes on eggs with plenty of supply to meet holiday demand.

### 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 went 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.

# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

**PERFORMANCE**  
FOODSERVICE



## Produce *(continued)*

### 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.

### Lettuce:

#### Butter

Supply is fair to poor and quality is good.

#### 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 and we are packing all private-label product. Demand is good, and weights are in the 18-20lbs range.



### Iceberg Lettuce

Huron will be harvesting all week; the target finish date is Saturday. Salinas will start, with very small volume, on Wednesday. The lettuce is at its best in over a month. We will now start harvesting Green Giant for cello lettuce. The market is active and the combination of increased demand and some acreage that is behind schedule, due to weather, is causing lighter supply.

### 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

The market is climbing. Stocks are limited; the crop is dominated by 110- to 175-count sizes. Quality is very good: scarring and styler are minimal.

### Napa

Supply and quality are fair.

### Onions

Many shippers are about a week away from CA onions. You're looking at about the same market this week as last week as Idaho, Oregon and Washington are pushing to finish up. They don't want to be caught up in a competition against new crop. Reds overall are very hot and the medium red is extremely limited. There is new crop product now in Texas but very little known about the quality.

### 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.

# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Parsley(Curly, Italian)

Quality is good. Supply is steady.

### Green Bell Pepper

With demand on the light side, Florida's pepper supply is holding its own for the East this week. Production has increased a bit as the weather has been excellent. Plant City has gotten rolling and older fields in the southern part of the state are still harvesting. Supply should be fairly consistent for the next week or two, but southern farms expect to wrap up by May 1. Georgia is on tap to begin around May 15, so hopefully Plant City can keep the ball rolling until then. Quality has been pretty good, although there have been weather effects on some lots recently. The Western pepper scene is a tale of two crops- older fields in the short rows in Mexico and fresh, new crops from the Coachella, CA area. Mexico's plants are getting tired and we're seeing thinner walls, some shrivel and the occasional turner. On the other hand, California's fruit is beginning to size up and has strong walls and excellent color.



### Jalapeños (Chiles)

With an active national market and the holiday, Mexico's chili pepper crossings look to be lighter going into the weekend. Quality has been mostly good up to this point but will likely begin to decline as heat takes a toll on the older plants in production. In the East, Plant City is starting to pick up steam with more volume and varieties available this week. Tomatillos are still 2-3 weeks away but are coming. Quality is nice on this new-crop fruit.

### 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

The market is unchanged. Stocks are sufficient. Quality is very good: fruit is juicy and tangy. Sugar levels range from 13 to 16 Brix.

### Idaho Potatoes

Idaho's Burbank market is mostly unchanged with the exception of the smaller sizes which dropped this week.... interesting. There are still enough Norkotahs out there to appear on the USDA. There are some shippers that are beginning to deplete their Nork inventory so it will be coming to an end soon. Then the markets could change so we will have to wait and see what happens for the rest of the storage crop season.

### Radishes

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

### 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.

# MARKET TRENDS

WEEK ENDING APRIL 26, 2019

**PERFORMANCE**  
FOODSERVICE



## Produce (continued)

### Spinach (Baby)

Supply and quality are good.

### Spring Mix

Supply and quality are good.

### 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

Florida's yellow squash supply is light, as most of the southern crops are finished, leaving Plant City as the primary sourcing area this week. Scarring and scuffing are definitely an issue and it's been difficult to get product that meets retail specs. Look for some possible relief from Georgia as they get up and running with first fruit of the season over the weekend. Expect this new volume to be light for a week or so, then kick in after that. On the other hand, zucchini availability is solid. Quality is better than yellow but is best described as average. The story is similar in Mexico with much better volumes and quality on zucchini than yellow. Barring weather issues, the Sonora area should have a fairly steady stream of supply for the next few weeks, at least on zucchini.

### TOMATOES

Florida's round tomato supply is a little stronger this week as more growers get started in the Ruskin/ Palmetto area. Sizing is on the larger side as growing conditions have been favorable and most are in crown picks. Lipman is one of the few growers still rolling in the southern part of the state and we'll continue with crown picks in Estero into the first part of next week. Although one grower has reported a little wind scar in early Ruskin/ Palmetto crops, overall quality from all growers/areas is nice. Roma availability is steady, but light as new growers gradually come online. Grape tomato farms have worked their way through a flush and are back down to normal levels. There's still plenty of nice-quality fruit to meet demand, mostly from the Palmetto/Ruskin growing zone. With Mainland Mexico's round tomato crops nearing the end of the season, volume and sizing will decline over the next few weeks until they finish sometime in early May. Baja is expected to begin new crops in the next 7-10 days and the CA desert will crank up in mid-May, keeping a mostly steady stream of round supply in the West. Romas are in good shape as well, with West Mexico's new crops rolling and Baja scheduled to start next week. Grape tomatoes are the wild card this week, as quality and volumes are declining on current crops.

### 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.

