The data contained in the Farmer’s Report is provided for informational purposes only, is not tailored to your specific needs, and is not intended as a substitute for any other publicly-available market data. The data provided may be subject to change. Nothing herein is the opinion of US Foods®. US Foods® neither assumes any legal liability nor makes any warranty or guaranty, either express or implied, regarding the completeness, accuracy or usefulness of this information.

**PRODUCE**

### VEGETABLES

**POTATOES**
- **Russets:** The market on russets is steady this week. Norkotahs out of Idaho are steady on 70 ct., 90 ct. and 6 oz., with moderate supply and good demand reported. The market has finally leveled off, but is expected to continue to be high until the damage from the Idaho freeze can be calculated, which won’t be until next week. Potatoes in the East have tightened up, causing a price increase. Quality is reportedly good.

**CLEAN**
- **Round Green:** The cabbage market is up this week. Increasing demand led to increased market prices. Quality is reportedly good.

**LEAF LETTUCE**
- **Green Leaf:** The green leaf market is down this week. Supplies will be around normal. Demand is slightly elevated, which falls into place with increased yields.
- **Romaine:** The romaine market is down this week. Supplies are expected to be hit or miss, due to quality issues.

**ICEBERG LETTUCE**
- The iceberg market is down. Supplies will be around normal for the week. Supplies and quality are both good. Prices are expected to stay favorable this week.

**GARLIC**
- No issues to report on domestic garlic this week. Suppliers can fill all orders, and good quality is being reported on peeled garlic.

**ONIONS**
- The jumbo yellow onion market is steady this week, including product out of Washington/Oregon and Idaho. There is moderate supply and good demand reported.

**MUSHROOMS**
- Product coming off the East Coast is steady, but Crimini supply is tight, while the supply of other varieties is good. Small Portabella mushrooms are available to replace Criminis. Supply and quality issues continue for product coming from the West Coast.

**CILANTRO**
- The cilantro market is mixed this week. Product out of Oxnard, California is down on 30’s and on 60’s, with moderate supply and demand reported. Product out of Central Coast, California is also down on 30’s and 60’s, with moderate supply and light demand reported. Product out of Mexico is up on 60’s, with moderate supply and good demand reported. Quality will vary by growing region.

**CUCUMBERS**
- Cucumber prices are up for the week. Supplies in both the East and West have tightened up, causing a price increase. Quality is fair in the East and good in the West.

**CELERY**
- The celery market is flat this week, with supplies varying, depending on the vendor. Replenished supplies and improved quality have moved market prices towards “stable”.

**YELLOW SQUASH**
- Yellow squash prices are up for the week. Mexico is showing a price increase out of both growing points. Florida is the only market reporting in the East. Quality continues to be good, with wind scarring being the main issue.

**ZUCCHINI**
- Zucchini prices are up for the week. Supply continues to be good, but there has been an uptick in demand, causing supplies to tighten up a bit. Quality looks to be good in all regions.

**GREEN BEANS**
- The green bean market is up this week. The freeze in Georgia/Florida has caused supply issues with prorates going into the holiday. Machine-picked product from South Florida is up, with lighter supply and strong demand reported. Handpicked product from Coachella Valley, California is up also, with lighter supply and strong demand reported. Imported haricot verts are up, with lighter supply and strong demand reported. Handpicked product from Mexico is up also, with lighter supply and good demand reported. Quality will vary by growing region.

**BELL PEPPERS**
- **Green:** Green bell peppers are up for the week. Supply has tightened up in both the East and West growing regions. Some of the fields have been battling cooler weather, which has slowed the harvest. Quality continues to be good.
- **Red:** Red bell pepper prices are steady to up for the week. Supply has tightened up a bit, causing a few sizes to increase in price. Quality continues to be strong out of hothouses and field-grown product.

**TOMATOES**
- **Rounds:** Rounds are steady to up this week. Mexico appears to be flat, while Florida is seeing a price increase as they battle cooler weather. Quality continues to be good in both regions, despite cooler weather.
- **Romas:** Roma tomatoes are steady to down for the week. Harvest in both Florida and Mexico continues to be light, but is improving slowly. Quality continues to be good in both regions.
- **Cherry:** Cherry tomatoes are steady to up for the week. Both Florida and Mexico are seeing a slight price increase for the week. Quality continues to be good.
- **Grape:** Grape tomatoes are up in price this week. The East Coast supply has tightened up, which is reportedly putting pressure on Mexico to help with demand. Quality continues to look good for the time being.

**CARROTS**
- The jumbo carrot market is steady to up this week. Product out of California is up, while product out of Mexico is steady. There is moderate supply and demand reported out of both regions. Quality continues to vary out of Mexico.

**GREEN ONIONS**
- The green onion market is mixed this week. Product out of Mexico is up on Large, steady on Medium and down on Small, with moderate supply and light demand reported. Product out of South Carolina is steady, with lighter supply and good demand reported. Quality will vary by growing region.

**CAULIFLOWER**
- The cauliflower market is down this week, with supplies varying, depending on the vendor. Quality and demand are good.

**ASPARAGUS**
- The asparagus market is steady to up this week. Product out of Peru is up, with moderate supply and demand reported. Product out of Mexico is steady, with lighter supply and demand reported. Quality will vary by growing region.

**BROCCOLI**
- The broccoli market is down this week, with supplies around normal for the week. Demand remains good.

---

**KEY**
- ↑ – Anticipating an up market
- ➡️ – Anticipating a steady market
- ➤️ – Anticipating a down market

All produce pricing trends are based on USDA data as of Nov. 19, 2019.
The data contained in the Farmer’s Report is provided for informational purposes only, is not tailored to your specific needs, and is not intended as a substitute for any other publicly-available market data or information. The Farmer’s Report is compiled from the last-received market data provided by the United States Department of Agriculture (USDA) and/or other market sources, and is subject to change without notice. Nothing herein is the opinion of US Foods®. US Foods neither assumes any legal liability nor makes any warranty or guaranty, either express or implied, regarding the completeness, accuracy or usefulness of this information.

**PRODUCE**

**HANGING FRUIT**

**APPLES AND Pears**
- **Apples**: All apple varieties out of Washington are steady, except for Granny Smith, which is down this week. Supply is moderate, with good demand and quality being reported.
- **Pears**: The pear market out of Washington remains stable, with moderate supply, good quality and lighter demand reported.

**CITRUS**

**LEMONS**
- Domestic lemon prices are steady to down for the week. D-3 continues to be the main source of the current domestic lemon program. Sizes continue to trend toward the 165 to 200 count size range. Quality is a mix of fair and good for now. Mexico prices look to be steady to down for the week as well.

**LIMES**
- Lime prices are steady for the time being. Crossings and harvests are down slightly, but supply remains steady. Quality looks to be good.

**ORANGES**
- Orange prices look to be steady to down for the week. Valencia season is wrapping up, with Navels now in production in California. Navels are peaking on 88’s and smaller sizes. Quality continues to be good out of California.

**BERRIES**

**STRAWBERRIES**
- The strawberry market is flat this week. The California Strawberry Commission Berry Report states that overall pack-outs from both California and Mexico are at similar levels compared to this time last year. There has been a slow start to Mexican crossings, as rain events throughout the berry-growing regions have hampered overall production. Overall quality and condition has been fairly good, although berry counts have been small.

**BLUEBERRIES**
- The blueberry market is up this week. Blueberry shipments are continuing from the Cañete region in Peru, where quality looks good and moderate temperatures are allowing steady harvest volumes. Warm temperatures last week in Salto-Concordia (Uruguay/Argentina) allowed growers to resume harvest. Quality is looking good, and sunny days ahead should allow for consistent harvest volumes. In Chile, sunshine and warm temperatures are in the forecast, resulting in increased shipments. Varieties are reporting to show good size, firmness and flavor.

**GRAPES**
- The grape market is steady this week, including Autumn King, Autumn Royal, Scarlet Royal, Red Globe, and Red Seedless out of both Kern District and San Joaquin Valley, California. There is moderate supply and good demand reported.

**TROPICAL**

**PINEAPPLES**
- Pineapple prices are down slightly for the week. Pineapples continue to trend toward larger sizes. Volumes are expected to increase to meet holiday demand.

**BANANAS**
- Banana prices continue to be steady. Supply continues to be good, with no quality issues being reported.

**AVOCADOS**
- Avocado prices are steady to down for the week. Avocados continue to trend toward larger sizes for the time being. There is more #2 supply hitting the market, which could lead to a larger price gap between #1 and #2 product. Quality continues to be good out of Mexico.

**MELONS**

**CANTALOUPES AND HONEYDEWS**
- Cantaloupes: The cantaloupe market is flat this week. Imported cantaloupes have begun in a small way, as predicted. The volumes will continue to increase in the upcoming weeks. Quality is good, and sizing is trending larger.
- Honeydews: The honeydew market is flat this week, too. Imported honeydew have also begun in a small way, as predicted. The volumes will continue to increase in the upcoming weeks. Quality is good, and sizing is trending larger.
All current beef pricing trends are based on USDA data as of Nov. 20, 2019. Last week’s trends refer to the USDA market for the full week of Nov. 11, 2019.

Cash cattle traded between $114-$117/cwt. last week. This week’s cash asking prices from feeders are steady.

Last week’s harvest was 657K head, up from the previous week, and of that, 506K were of the steer/heifer variety. Cattle analysts are projecting this week’s harvest to be around 656K head.

The grade for the week ending Nov. 8, 2019 came in with 78.7% of all the steers and heifers grading Choice or higher, up from the week prior. Select product was down at 16.7%, and Ungraded reported up at 4.6%.

**GRINDS**

**GROUND CHUCK:** The ground chuck market saw an increase in price last week. This market is down in the current week.

**GROUND BEEF 81/19:** 81/19 ground beef experienced a gain in price last week. This market historically experiences some downside in pricing in these next few weeks.

**GROUND BEEF 73/27:** The 73/27 ground beef market also took a price increase last week. Like the 81/19 ground beef, the 73-blend historically experiences discounted prices over the next few weeks.

**ROUNDS**

**PEELED KNUCKLES:** Peeled knuckles traded up across both grades last week. Peeled knuckles historically trade relatively flat through the remainder of the year.

**INSIDE ROUNDS:** Inside rounds increased in price in last week’s market. Prices are above seasonal averages right now on insides, and the market is currently trading at a discount three days into the current trading week.

**BOTTOM ROUND FLATS:** Bottom round flats traded flat to up last week. Bottom round flats are trading slightly up to slightly down this week on the Choice and Select grades, respectively.

**EYES OF ROUND:** Eyes of round traded up for the Choice grade last week and down for the Select grade. Through three days of trading this week, there is a similar trading pattern occurring.

**LOINS**

**STRIPS:** Strips took an increase in price last week, and analysts are projecting that there is upside ahead for strips. Strips historically start to gain in price around early-to-mid-December.

**TOP BUTTS:** Choice top butts traded slightly down last week, but Select top butts traded at a healthy increase. Through three days of trading this week, both grades are experiencing large discounts to price.

**TENDERLOINS:** Choice tenders closed last Friday at the highest weekly average in history. Historical data would point to tenders discounting in price over the next few weeks, although they are slightly up through mid-week close this week.

**RIBS**

**RIBEYES:** Both light and heavy ribeyes traded relatively flat last week. Like tenders, we are in the period where historical data would point to price decreases. Through three days of trading this week, all graded light and heavy ribeyes are trading higher than last week.

**CHUCKS**

**CHUCK ROLLS:** Chuck rolls took large price increases last week, which was predicted by analysts. They believe that chuck rolls will take another slight increase this week, and that chuck rolls have been affected by last week’s high import market.

**TERES MAJORS:** Teres Majors traded at a price increase on all grades last week. Historical data suggests that the Teres Major market typically trades flat for the remainder of the year, and both grades are trading steady through three days this week.

**BRISKETS:** Briskets traded up last week. The brisket market historically takes a slow climb through the remainder of the year; however, prices are down on all grades through three days of trading this week.

**THIN MEATS**

**BALL TIPS:** Choice ball tips traded down and Select ball tips were up in last week’s market. This market historically trades relatively flat throughout the remainder of the year, although both grades are currently trading up through three days of trade this week.

**FLAP MEAT:** Choice flap meat traded down and Select flap meat traded up last week. Through Wednesday’s market close, the Choice grade is trading flat and the Select grade is experiencing discounting.

**FLANK:** Flank steaks were up in price last week. Both grades are trading up through three days in the current week.

**SKIRT STEAK:** The outside skirt market took a price increase last week. Outside Skirts historically trade relatively flat for the remainder of the year, and the current week’s trading market makes it seem like last week’s gain will be wiped out with this week’s discounting.
Pork market information is from the week of Nov. 11, 2019.

Last week the USDA estimated hog slaughter was 2.749 MM, a new record-high weekly harvest. Total harvest was roughly 2% higher than the previous week and 4% higher than the same week last year. Year-to-date slaughter compared to last year is up 3.7%.

Live hog weights are flirting with record highs, only 1.6 ounces away from the previous high. Live hog weights are a good indicator of the relationship between available hog supply and packer demand.

**LOINS**

Prices in the loin complex were mixed. After nearly 10 weeks of sideways trading, boneless loin prices moved moderately higher. Bone-in loin prices continued to remain choppy and traded lower. Loin prices historically move lower in November, as channel demand begins to shift towards turkeys and hams for the holidays.

**TENDERS**

Pork tenderloin prices moved slightly higher. Retail activity with pork tenderloins was reported slightly higher against the previous week and year. Historically, pork tenderloin prices trend lower in November-December before experiencing strength in the new year.

**BUTTS**

Pork butt prices continued to move slightly higher. Retail ad activity is slightly higher, and exports are being reported as steady. Historically, butt prices begin to stabilize and move slightly higher in late November into December.

**RIBS**

The rib complex moved higher. Packers are allocating product to freezers for forward bookings, which is creating some tightness in certain rib markets. Both rib markets are trading higher than last year currently. Historically, rib prices remain unsettled before finding traction to go higher in late December.

**BELLIES/BACON**

Pork belly markets spiked higher. Harvest levels remain at record highs, so strong demand is likely driving the current rally. Last year, the belly market slipped lower through late November, at which time it bounced higher through December. The belly and bacon markets should be considered volatile, according to analysts.

**HAMS**

The ham markets continued sharply higher, pushing markets to a 3-year high. Previously reported forward buying and export demand are likely driving the momentum in this market, along with possible last-minute holiday hams. Ham prices remain volatile, according to analysts.

**TRIMMINGS**

Trimming prices moved higher. Historically, this time of year is when trimming prices are at the bottom of the market, and remain unsettled into the new year. Lean trimmings may experience unexpected strength, due to their lean ratio and relationship to boneless picnics, which are also trading significantly higher than last year at this time.

**PICNICS**

The picnic complex continued higher. Analysts report that the export channel is driving strong demand in both these items at the moment. Additionally, bone-in picnics are also served as a substitute to hams during the holidays, so demand is also strong. Analysts consider picnic prices to be volatile.
The data contained in the Farmer’s Report is provided for informational purposes only, is not tailored to your specific needs, and is subject to change without notice. Nothing herein is the opinion of US Foods®, and US Foods® neither assumes any legal liability nor makes any warranty or guaranty, either express or implied, regarding the completeness, accuracy or usefulness of this information.

**CHICKEN**

Poultry market information is from the week of Nov. 11, 2019.

This week, small, medium and jumbo wing markets remained unchanged, as well as small boneless breasts. The medium and jumbo boneless breast markets slightly increased. Analysts state the demand in this market from retail and Further Processors has drawn increased interest. There were not any changes in select or jumbo tenderloins this week. In the near term, analysts forecast that these markets should trend flat to downward. Analysts are referencing the USDA projections of increased jumbo headcount, along with decreased demand going into the holiday season, which could keep pricing flat to slightly down. Jumbo and small tenders settled out this week, as supply and demand appear to have stabilized, according to reports. Analysts state the demand in this market from retail and Further Processors has continued to be weak; however, they also state that this could change rapidly if Further Processors step back into these markets.

Export demand continues to be reported as balanced, with developing interest. Domestic demand remains sluggish. Leg quarters and bone-in whole leg markets slightly increased, with anticipation of increased expert demand. Thigh meat and leg meat markets were unchanged this week. With increasing jumbo supply, analysts predict these markets could trend flat to downward in the near term. Whole birds/ WOG demand is balanced for now. As supply increases, analysts report that this could result in a flat to slightly downward market trend.

**BROILER-TYPE EGGS SET IN THE UNITED STATES UP 3%**

Hatcheries in the United States weekly program set 235 million eggs in incubators during the week ending Nov. 16, 2019, up 3% from a year ago. Average hatchability for chicks hatched during the week in the United States was 82.4 percent. Average hatchability is calculated by dividing chicks hatched during the week by eggs set three weeks earlier.

**Starting in 2018, the 19 State totals have been discontinued.**

**BROILER-TYPE CHICKS PLACED IN THE UNITED STATES UP 4%**

Broiler growers in the United States weekly program placed 183 million chicks for meat production for the week ending Nov. 16, 2019, up 4% from a year ago. Cumulative placements from the weeks ending Jan. 5, 2019 through Nov. 16, 2019 for the United States were 8.54 billion, up 2% from the same period a year earlier.

**Starting in 2018, the 19 State totals have been discontinued.**

**TURKEY**

**BONELESS, SKINLESS TURKEY BREASTS**

Boneless, skinless turkey breasts were flat this week, as buyers have completed filling any voids for the holidays. In the near term, analysts expect a flat to slightly downward market.

**WHOLE FROZEN TURKEYS**

The whole turkey market was flat this week. Spot loads are difficult to uncover, due to the upcoming holidays. Analysts expect this market should trend flat to slightly upward, as vendors finish their buying to cover any shortfall.

**BONELESS, SKINLESS THIGHS**

The boneless, skinless thigh meat market was flat this week. Analysts speculate that this market could be hampered by lack of Further Processor demand and jumbo supply increasing. Boneless thighs continue to be offered on the spot market at attractive prices. Analysts’ expectations are that this market will trend flat to downward for the near term. The medium boneless breast market was slightly higher, with spot load offerings being minimal. The jumbo boneless breast category was slightly up this week, with spot product being uncovered sporadically and held with confidence.

This week, select/small and jumbo tenderloin markets were flat. Analysts reference Further Processors and retailers continue to move in and out of these markets, which could result in a flat to downward trend in the near term.

**WHOLE CHICKEN & CUT-UP PARTS**

Analysts report that small bird supply and demand is still out of balance, pushing pricing higher, as demand is harder to fulfill. Analysts believe this trend may continue into 2020. The market for larger-size whole birds and WOGs is in a balanced market. As jumbo bird availability increases, analysts believe this could develop into slight decreases in pricing for the near term.

**BONELESS, SKINLESS BREASTS & CHICKEN TENDERLOINS**

The select/small boneless breast market was flat this week. It is reported that this market continues to be supported by the YTD headcount deficit in the small bird category. As the market moves into what is historically a lower demand boneless breast season, analysts believe the select/small market could trend flat to slightly downward in the near term. The medium boneless breast market was slightly higher, with spot load offerings being minimal. The jumbo boneless breast category was slightly up this week, with spot product being uncovered sporadically and held with confidence.

**WINGS**

All categories of the wing markets were flat this week. Analysts expect the small wing market will trend flat to downward for the near term. Medium wings will consistently be harder to uncover, due to lack of processors growing medium-size birds. Analysts’ expectations are that the medium market will remain flat to upward in the near term. The jumbo wing market went unchanged this week, with spot product offerings still available and with varying degrees of discounting reported. The jumbo wing market is expected to trend flat to downward in the near term.

**BONELESS, SKINLESS THIGHS**

The boneless, skinless thigh meat market was flat this week. Analysts speculate that this market could be hampered by lack of Further Processor demand and jumbo supply increasing. Boneless thighs continue to be offered on the spot market at attractive prices. Analysts’ expectations are that this market will trend flat to slightly downward for the near term.
COMMODITY OIL

SOY, CANOLA AND PALM OIL

SOY OIL:
- The December soybean oil contract fell nearly 100 points from the start of the week, closing on Nov. 15, 2019 at $.3043
- The U.S. soybean harvest was reported at 85% complete last week, up from 75% the prior week, but still low when compared to the 5-year average of 92%.
- NOPA released their October domestic soybean crush estimate on Friday, Nov. 15, 2019, at 175.4 million bushels, up from 152.6 million in October, and well above the average trade estimate of 166.8 million.
- Brazil’s CONAB is estimating their 2019/2020 soybean crop at a record 120.86 million metric tons. The crop is approximately 65% planted, with mostly favorable weather forecasts throughout the remainder of November.
- There are still no set targets, financial or volume, regarding China’s U.S. agricultural purchases, and the date and location for the official signing of the “Phase 1” agreement is still unknown, although reports indicate that both sides continue to proclaim that talks are on track and nearly complete.

CANOLA
- Canola seed futures remain weak, as analysts point to Canadian harvest totals not being as detrimental as analysts once thought, as well as the continued lack of progress in the political dispute between Canada and China.

PALM OIL
- According to analysts, expectations for higher biodiesel mandates in both Malaysia and Indonesia in 2020 continue to lend underlying support to the market, as well. Palm oil prices were up almost 15% just in the month of October.

DAIRY

All dairy pricing trends are based on USDA and CME data as of Nov. 13, 2019.

BUTTER
Analysts report that butter prices are at their lowest levels since early 2018, as they continue to feel seasonal pressure. Production remains firm, as cream supplies are comfortable across the U.S. Analysts report the lower prices are starting to attract some additional inquires for the first half of next year, but adequate butter supplies in cold storage will help keep prices relatively stable.

CHEESE
Production has been increasing the past few weeks, with increased spot loads of milk being reported at discounted levels and manufacturers taking advantage of the historically strong cheese prices. Schedules continue to favor cheddar production, and are starting to increase the nearby availability of product. With the increased availability of fresh cheese coming to market, this should help correct the block and barrel spread in the upcoming weeks. Increased milk production and availability should keep cheese production rates firm, helping to keep pressure on the cheese markets.

SHELL EGGS
Better-than-expected retail orders this past week continued to support this market, as the combination of colder weather, aggressive pricings and the lead-up to Thanksgiving have kept demand strong. Nearby supplies have tightened up accordingly, as suppliers are holding inventories with much greater confidence. Spot availability is considered tight to short, with some buyers looking at alternative sizes, instead of the larges which have seen the biggest increase in price. Other buyers are attempting to limit their purchases when possible, given the higher prices.

MILK & CREAM
Milk production in the U.S. is trending higher, as is seasonally the case. Analysts report cooler temperatures and some regions increasing herd numbers are contributing to the better output. However, nearby milk availability is still considered tight, as fluid milk demand was stable for bottlers, with school demand is in full swing. Holiday demand is also starting in the cream market, as seasonal Class II demand is picking up.
All seafood pricing trends are based on Urner Barry data and supplier quotes as of Nov. 13, 2019.

**SHRIMP, DOMESTIC**
(Whites and Browns): Analysts continue to see firmness in both Whites and Browns, due to strong demand and low levels of raw material available.

(Domestic Puds): It is reported the market is firming, as processors bid up product.

**SHRIMP, IMPORTED**
(Black Tigers and Whites): The seafood industry reports stable pricing on Tigers. However, bidding is moving to White shrimp, resulting in a steady to weaker market, according to analysts.

(Mexican Browns and Whites): Analysts report that suppliers may have a concern on Browns as well as large-size shrimp, as they are in very tight supply.

**CATFISH**
Domestic: Production is being reported by vendors as steady. Pricing is expected to be steady for the next 30 days, according to analysts. H&G product continues to be firm.

Imported: Urner Barry reported higher pricing, due to the Chinese consuming more fish because of the lack of pork caused by the African Swine Fever outbreak.

**SALMON**
Atlantic Farmed Salmon: Analysts report that the frozen market is stable. The fresh market is split. The European market is up slightly; however, the Chilean market is down slightly.

Mahi-Mahi
Analysts report that pricing is steady, with fewer offerings. Inventory is in good shape along all size portions. The 2019-2020 season is getting underway in Peru now.

**SCALLOPS**
Sea: Reports indicate that pricing has shown some volatility on the fresh side. Frozen prices continue to be stable to slightly down.

Bay: Pricing is stable for next week, but analysts indicate that bay scallops could move higher, with further receipts that would have the additional tariff associated with it.

**TILAPIA**
Demand has been steady, as analysts point to the market settling into higher costs.

**PANGASIUS**
Pricing is now steady, as reported inventory levels on 5-7’s and 7-8’s are in good supply. There are some reports that 3-5’s are tight. Reports are showing a possible higher price point for the Lenten season (end of February to early April in 2020).

**WHITEFISH COMPLEX**
COD: It is reported that pricing is stable. Reports indicate that inventory is firm, behind strong demand, as other similar species increase in price.

**POLLOCK**
The fishery for Pacific pollock has produced only smaller, 2-4 oz. fillets. Analysts expect that this could cause an inventory issue for frozen loins if fisheries don’t start catching larger fish. Larger fillets 4-6 and 6-8 oz. are very tight.

**HADDOCK**
Vendors are reporting that pricing is stabilizing. Analysts report that this will improve moving into Q1 of 2020.

**FLounder**
Inventory levels are in good shape. Vendors report seeing lower pricing on Argentine fillets, as they have reported more inventory in the U.S. than they want to hold.

**TUNA, YELLOWFIN**
(Frozen Steaks & Loins): Analysts report that tuna pricing and inventory is stable.

**SWORDFISH**
Analysts report that swordfish pricing is stable. Inventory levels are in very good shape.

**KING CRAB**
(RED & GOLDEN): Analysts report product is very short in the marketplace, and is expected to be tight ongoing. Golden product of Russia is increasing in price. Operators should start looking holiday needs now.

**CRABMEAT**
(Blue & Red, Pasteurized): Analysts report that the Blue Swimming Crab market is stable.

Mexico Blue Crab season is in full production now, on both the East and West Coasts. Distributors should see more inventory imported into the U.S.

**SNOW CRAB**
Alaskan: Most vendors are off the market, with very little if any product out there currently. The 2019-2020 quota has been announced; there will be an increase of 20-25%, and the expectation is the majority of the catch will fall into the 5-8 oz. size range.

Canadian: Production has ended in Canada. Vendors are reporting that all sizes are getting tight with inventory. Urner Barry is reporting higher pricing now on all size clusters, with very limited offering available. Distributors will have to start looking at Russia and Norway for additional product.

**LOBSTER**
North American Lobster: Pricing is moving higher on tails, as production is very slow. Vendors are reporting poor inventory levels. Operators should review holiday needs now. The Maine fishery is coming to a close, and it is projected that the fishery will be off 40% YOY.

Lobster Tails, Warm Water: Vendors are reporting the harvest is now coming in at a decline of 55% YOY. It is expected that overall demand and lack of inventory will continue to put ongoing pressure on this category. Analysts expect this trend to be ongoing.

Lobster Meat: Pricing is moving up, and demand is reported as steady.
## U.S. TRADE DISPUTE WITH CHINA – PRODUCTS IMPACTED

### Products with Price Increases

<table>
<thead>
<tr>
<th>Tariff Group</th>
<th>USF Product Group Impacted</th>
<th>PIM Categories Impacted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metals - Iron, Steel, Aluminum</td>
<td>Foil Bags, Foil Carryout Containers, Foil Roll, Trays and Pans, Foil Wraps and Sheets, Basket Liners</td>
<td></td>
</tr>
<tr>
<td>Metals - Iron, Steel, Aluminum</td>
<td>CES</td>
<td>Heavy Equipment, Smallwares, Parts &amp; Supplies</td>
</tr>
<tr>
<td>Metals - Iron, Steel, Aluminum</td>
<td>Grocery</td>
<td>Beverages</td>
</tr>
<tr>
<td>Metals - Iron, Steel, Aluminum</td>
<td>GC</td>
<td>PC Savory Condiments</td>
</tr>
<tr>
<td>Metals - Iron, Steel, Aluminum</td>
<td>Canned Goods</td>
<td>Canned Tomatoes, Dry Pack Beans, EB Canned Fruit, Ketchup, Shelf-Stable Entrées, Canned Pasta, Oil, Dessert Toppings, Cocoa</td>
</tr>
<tr>
<td>Metals - Iron, Steel, Aluminum</td>
<td>Value Added Shelf-Stable</td>
<td>Sauces, Shelf-Stable: Gelatin, Pudding &amp; Pie Filling, Shelf-Stable</td>
</tr>
<tr>
<td>Metals - Iron, Steel, Aluminum</td>
<td>Canned Goods</td>
<td>Canned Fruit and Veg., Pudding &amp; Custard, Cheese, Sauces, Beans</td>
</tr>
<tr>
<td>Metals - Iron, Steel, Aluminum</td>
<td>Value Added Shelf-Stable</td>
<td>EB Gelatin, Pudding &amp; Pie Filling, Shelf-Stable &amp; EB Sauces, Shelf-Stable</td>
</tr>
</tbody>
</table>

| Disposables                  | Bags, Food Storage (PE) and (PP), Bags T-Shirt, Buckets, Can Liners, Cups, Dust Pans, Food Containers, Lids, Pastry Bags, Urinal Deodorizer, Aprons, Bibs, Headware (Disposable), Trays & Film |
| Disposables                  | Bags, Cups, Drinking Straws, Facial Tissue, Food Containers, Lids, Napkins, Paper Towels, Pizza Boxes & Circles, Toilet Seat Covers, Toilet Tissue, Register Tape (Disposable), Labels, Paper Wraps & Boxes |
| Disposables                  | 100% Cotton Fabrics, Cups & Bowls, Food Containers, Plates, Platters, Lids |
| Disposables                  | Latex, Nitrile, PE, Vinyl/Synthetic                                             |
| Disposables                  | Catfish, Flounder, Haddock, Tilapia, Pasteurized Crabmeat, Scallops, Squid, Crawfish |
| Disposables                  | Mandarinis, Nuts, Cauliflower, Other Fruits & Veg.                             |