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VEGETABLES

CUCUMBERS 🍅
Cucumber prices are steady for the week. Florida is winding down harvests, as their import season is on the cusp of starting. Mexico is experiencing steady volume, which analysts believe is keeping the price steady. Quality is good in both regions.

CELERY 🥕
The celery market is down this week, with supplies reporting as around normal. Celery has good quality, with occasional inconsistent sizing, bowed structure, minimal to occasional mechanical damage and the occasional cracked node. Demand is fair.

YELLOW SQUASH 🍈
Yellow squash prices are mixed for the week. Florida is experiencing a steady to up market, depending on the size. Mexico looks to be steady for the week. Quality in the East is fair and good in the West.

ZUCCHINI 🍅
The zucchini market is mixed this week. Mexico looks to be flat across all sizes, while Florida is steady to up, depending on the size. Quality is good in both regions.

GREEN BEANS 🌱
The green bean market is mixed this week. Machine-picked product out of South Florida is down, with lighter supply and good demand reported. Handpicked product out of Mexico is down, with moderate supply and demand reported. Imported haricot verts are up, with moderate supply and demand reported. Quality will vary by growing region.

BELL PEPPERS 🌶
Green: Green bell peppers are steady to up for the week. Florida prices are steady, while Mexico is steady to up, depending on the size. Quality looks to be good in both the East and West.

Red: Red bell peppers are steady to up for the week. Supply is fair in the West and light in the East. Quality continues to be good in both fields and hothouses.

TOMATOES 🍅
 Rounds: Round tomato prices continue to climb higher. Harvest continues to be limited in both regions. Price increases will vary by size and grade. Quality is fair for now. “Act of God” still is in effect for all tomatoes.

Romas: Roma tomato prices are up again this week. Harvests continue to be light out of both regions. Quality is fair for the time being. Overall prices have now balanced out between Florida and Mexico. “Act of God” still is in effect.

Cherry: Cherry tomatoes are steady to up for the week. Supply continues to be light in both the East and West. Quality is fair for the time being. “Act of God” still is in effect for all tomatoes.

Grape: Grape tomatoes continue to go up in price. Harvests continue to be light in both growing regions. Mexico is seeing a larger price jump, but remains cheaper than Florida product. Quality is fair at best. “Act of God” still is in effect for all tomatoes.

CARROTS 🥕
The jumbo carrot market is steady to down this week. Product out of Kern District, California is down, while product out of Mexico is steady. There is moderate supply and demand reported, and a wide range in quality out of both growing regions.

GREEN ONIONS 🧅
The green onion market is steady to up this week. Product out of Mexico is up on medium, with moderate supply and lighter demand. Product out of South Carolina is steady, with lighter supply and good demand reported. Quality will vary by growing region.

CABBAGE 🥬
Round Green: The cabbage market is down this week. Abundant supply is being reported with good demand and quality.

LEAF LETTUCE 🥥
Green Leaf: The green leaf market is down this week, with supplies reporting as good. Green leaf quality remains good with occasional irregular sizing, light insect damage, and mechanical damage. Texture is fair to good. Demand is steady, as spot pricing has come off a bit.

Romaine: The romaine market is down this week, with supplies reporting as good. Romaine quality has been mostly good, with occasional ribby structure, some twist, occasional mechanical damage and minimal insect damage. Demand is good.

ICEBERG LETTUCE 🥣
The iceberg market is down, with supplies reporting as around normal. Iceberg has good quality overall, with the occasional misshapen and puffy heads causing lower weights.

GARLIC 🧄
No issues to report on domestic garlic. Good supply and quality are being reported.

ONIONS 🍄
The jumbo yellow onion market is up this week. Product out of Washington and Oregon is up, with moderate supply and demand reported. Product out of Idaho is up also, with moderate supply and good demand reported.

MUSHROOMS 🍄
No issues to report on mushrooms coming from the East Coast, except that Crimini supply is still tight, and this trend is expected to continue through December. Supply and quality issues are also expected to continue for mushrooms coming from the West Coast.

CILANTRO 🤠
The cilantro market is steady to down this week, depending on growing region and pack. Product out of Oxnard, California is steady on 30’s and down on 60’s, with moderate supply and demand reported. Product out of Texas is steady on 60’s, with light supply and demand reported. Product out of Imperial, Coachella, Palo Verde, Central California and Western Arizona is down on 30’s and on 60’s, with moderate supply and demand reported. Quality will vary by growing region.

All produce pricing trends are based on USDA data as of December 17, 2019.
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ASPARAGUS ↑
The asparagus market is up this week. Product out of Peru is up, with moderate supply and demand reported. There is a wide range in quality.

BROCCOLI ↓
The broccoli market is down this week, with supplies reporting as around normal. Broccoli has minimal brown head, knuckling, occasional spread and sporadic amounts of mildew, caused by recent rains. Demand is good.

HANGING FRUIT

APPLES AND PEARs

■ Apples: All varieties out of Washington are steady, with moderate supply and 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 ➤
Lemon pricing is steady to down for product out of California. D-1 and D-3 fields are in full production in California. Harvest is starting to ramp back up now that the rain has moved on. For now, quality is good.

LIMES ➤
Lime prices are steady for the week. Now that the weather has improved, it is expected that the harvest will start to pick up, with a slight pull expected during the holiday weeks.

ORANGES ➤
Navel orange prices out of California are steady to down for the week. Navels continue to trend toward the 88’s and smaller sizes. Cara Cara and Blood Orange harvests will start to pick up in the upcoming weeks. Quality continues to be good.

BERRIES

STRAWBERRIES ➥
The strawberry market is down this week. The industry has limited volumes available from all three growing regions. Mexico continues to under-supply the market, with most importers struggling to meet their daily commitments. Production out of California is good, with quality keeping fruit in local markets. Analysts warn that if the rain in Florida interrupts the flow of fruit this week, demand could exceed supply, as the market heads into the pre-Christmas pull.

GRAPEs ➤
Grapes are now in the import season, and the market is mixed this week, depending on the variety and size. XL and jumbo Red Globe product is up, while large is steady, with moderate supply and demand reported. Both large and jumbo White Seedless grapes out of Peru are down on XL, jumbo, and large, with moderate supply and demand.

TROPICAL

PINEAPPLES ➤
Pineapple prices are steady. 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. 48’s and 60’s count is seeing a price drop, while the rest are steady. Quality is improving as the weather improves in Mexico. Crossings and harvest will be down as we go through the holiday week.

MELONS

CANTALOUPES AND HONEYDEWS ➥
■ Cantaloupes: The cantaloupe market is down this week. Imported melons are sizing up, with volumes beginning to increase. Quality is reporting as good.
■ Honeydews: The honeydew market is up this week. Imported melons are sizing up, with volumes beginning to increase. The honeydews are trending larger in size, with the majority of the volume in jumbo 5 counts. Quality is reporting as good.
All current beef pricing trends are based on USDA data as of December 18, 2019. Last week’s trends refer to the USDA market for the full week of December 9, 2019.

Cash cattle traded between $119-$122/cwt. last week. This week’s cash asking price from feeders is slightly higher than a week ago.

Last week’s harvest was 662K head, which was down from the week prior. Of that amount, 541K were of the steer/heifer variety. Cattle analysts are projecting this week’s harvest to be steady.

The grade for the week ending December 6, 2019 came in with 81.4% of all the steers and heifers grading Choice or higher, up from the week prior. Select product was down at 15.6%, and Ungraded reported steady at 3.0%.

**RIBS**

**RIBEYES:** Both light and Heavy Ribeyes experienced weakness across the Choice grade last week. Like tenders, ribeyes historically decrease in price through the end of the year, and through three days of trading this week, the Choice grade is seeing further declines.

**CHUCKS**

**CHUCK ROLLS:** Chuck rolls took healthy discounts on all grades last week. Analysts note the recent sell-off has made chuck rolls a relative value again, and prices are projected to increase in January.

**TERES MAJORS:** Teres Majors traded down last week. Teres Majors historically start to take a slow climb in price higher from now through mid-April; however, given the recent inflated prices, analysts are predicting some softness over the next few weeks.

**BRISKETS:** Briskets also traded down last week. Historically, briskets trade flat to slightly up from now through early January.

**THIN MEATS**

**BALL TIPS:** Ball tips took price decreases last week across all grades. Analysts expect ball tips to increase in price over the next few weeks.

**FLAP MEAT:** Flap meat traded at a discount last week. Like ball tips, analysts are expecting flap meat to increase in price over the next month.

**FLANK:** Flanks traded down last week. Flank steaks historically trade up from now through mid-March.

**SKIRT STEAK:** The skirt steak market traded at a discount last week. This market historically trades flat to slightly up from now through April.
Pork market information is from the week ending December 13, 2019.

The USDA-estimated hog slaughter was 2.763 MM, roughly 1% lower than the previous week. Slaughter was up roughly 6% compared to the same week last year.

**LOINS**
Prices in the loin complex were mixed. Boneless loins traded lower, and the bone-in loins were marginally higher. Retail activity is steady to higher versus the previous week, but down compared to last year. Historically, the holidays favor other cuts or proteins, so the loin markets generally become unsettled and dip to their annual lows in the coming months.

**TENDERS**
Pork tenderloin prices took a sizable decline, but the market is already showing signs of recovery. Prices have remained relatively flat on pork tenderloins for the past three months as supply and demand remain in healthy balance. Historically, pork tenderloin prices begin to move higher in the beginning of the year.

**BUTTS**
Upward pricing momentum for pork butts stalled, as retail activity is down from the previous week and year. Export sales of butts were slightly up. Historically, the butt market is bullish leading up to Christmas, and then softens into the January/February timeframe.

**RIBS**
The rib complexes were reported as steady to lower. Backribs traded slightly lower, and spareribs held flat. Both rib markets are trading higher than last year. Packers continue to actively freeze and convert ribs for forward bookings, which may be creating perceived tightness in the rib markets. Historically, both rib items are poised to begin their upward pricing trajectory.

**BELLIES/BACON**
The belly market continued to have weaker undertones. Historical pricing for both the five-yr average and last year’s average would suggest that the pricing trajectory could turn higher into January.

**HAMs**
The ham markets continued to move up. Ham markets are 50-60% higher than last year, which analysts believe could lead to a price correction lower.

**TRIMMINGS**
Pork trimmings are down. Given historical performance, the market is expected to be entering the bottom of the market for pork trimmings.

**PICNICS**
Picnic prices continue moving higher. Analysts point to strong export and holiday demand. These current price levels may also be driving whole shoulder prices higher, according to analysts. The rally in both picnic markets has been steeper than in past years. Prices are expected to correct lower at any moment, according to analysts.
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**CHICKEN**

**BONELESS, SKINLESS TURKEY BREASTS**

Boneless, skinless turkey breasts were flat this week. In the near term, analysts expect a flat to slightly downward market.

**WHOLE FROZEN TURKEYS**

The whole turkey market was flat this week. Analysts expect this market should trend flat to downward.

**Poultry market information is from the week of December 16, 2019.**

This week, all categories of wings and boneless breast remained unchanged heading into the upcoming holiday weeks. Analysts state the demand in these markets from retail, Further Processors and export have 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 upward, as further processors continue to move in and out of these markets.

This week, leg quarters, bone in thighs and leg/thigh meat categories remained unchanged, as analysts predict these markets could trend flat to upward 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 5%**

Hatcheries in the United States weekly program set 237 million eggs in incubators during the week ending December 14, 2019, up 5% from a year ago. Average hatchability for chicks hatched during the week in the United States was 81.7 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 3%**

Broiler growers in the United States weekly program placed 189 million chicks for meat production for the week ending December 14, 2019, up 3% from a year ago. Cumulative placements from the week, ending January 5, 2019 through week, ending December 14, 2019 for the United States were 9.28 billion, up 2% from the same period a year earlier.

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

**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 higher-demand boneless breast season, analysts believe the select/small market could trend flat to slightly upward in the near term. The medium boneless breast market was unchanged, with minimal spot load offerings. The jumbo boneless breast category was flat this week, with minimal spot product offerings, and held with confidence. Analysts believe that with additional Further Process, retail and export interest markets will trend flat to upward in the near term.

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 upward trend in the near term.

**WINGS**

This week, the small wing market was flat. Analysts expect the small wing market will trend flat to upward 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. Due to reduced production associated with the upcoming holiday weeks, spot offerings are expected to retreat. 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. Spot offerings of boneless thighs have become harder to uncover, and are held with confidence. Analysts expectations are that this market will trend flat to slightly upward in the near term.
COMMODITY OIL

SOY, CANOLA AND PALM OIL

SOY OIL:

- The January soybean oil futures were up 125 points at last week’s close from the December 9, 2019 open, closing at $.3136.
- Analysts are reporting that the “Phase 1” trade deal with China has been agreed upon in principle. China has been back in the market for soybeans, following up on the recently granted waivers for 1 to 2 million metric tons, with their largest weekly purchases from the U.S. in eight months.
- The U.S. soybean harvest was reported at 96% complete, up from 94% the prior week but slightly behind the five-year average of 99%.
- Domestic soybean board crush margins have recovered since mid-October, rallying from a low of 60 cents per bushel in October to over $1.00; analysts report that this may have helped keep soybean oil basis values stable.
- According to reports, Democrats in Congress have put forth new legislation that would extend the biodiesel blender’s tax credit for five years, with the last three years backing the credit down to 33 cents per gallon by the end of the term.

CANOLA OIL

- Statistics Canada estimated their 2019 canola crop at a four-year low of 18.65 million metric tons, compared to 20.34 MMT last year. Analysts are still reporting that stocks remain adequate, due to higher 2019 carry-in and the continued lack of export business to China.

PALM OIL

- The Malaysian Palm Oil Board reported end-of-November palm oil stocks at a three-month low of 2.26 million metric tons, down 4.1% from the 2.352 MMT reported in October. Palm oil prices finished lower the week of December 9, 2019, as Indian import data was weak, and Malaysia announced an increase in their palm oil export tax to 5% after being duty-free since May.

DRY COMMODITY

SUGAR AND DRY BEANS

SUGAR

- Early freezes in key beet growing areas, such as Louisiana, did not allow for a full harvest of the beet crops. According to reports, the damages to the beet crop forced both United Sugars Corp. and Western Sugar Cooperative to issue force majeure notices.
- Since the October WASDE report, estimated amounts of U.S. sugar production have been reduced by 900,000 mts (700,000 mts beet and 200,000 mts cane). Analysts state the industry will look to cane refiners to offset this shortfall.
- The market that had been trading at $35 net bulk basis is now trading at $43-$44 cwt. net bulk basis, CY-2020.

DRY BEANS

- The USDA reports that flooding during bean crop planting and an early frost before harvest has reduced the total bean crop by over 30%.
- On January 10, 2020, the USDA will release its annual summary for the bean crop, which will give information on harvested acres, yields and most importantly, total production.
- Analysts state that the pinto bean market has moved significantly stronger, in light of lower-than-expected production. Demand has been strong for any available pintos that growers are willing to sell. The market continues to move higher to try to encourage grower selling. Export demand remains strong, as both the Dominican Republic and Mexico are looking for product. The black bean market has firmed, as overall supplies are now tighter than previously expected, and there will be some substitution, due to lack of supply in other bean classes. Overall demand remains strong, and the market is watching Mexico to understand what they may need to cover in the first half of 2020, due to their short crop situation, as well.
All dairy pricing trends are based on USDA and CME data as of December 18, 2019.

**Butter**

Churn rates remain steady, and are expected to increase in the upcoming weeks. Abundant cream availability has kept supplies flowing to plants, and run rates are firm. Cold storage inventory remains readily available despite the seasonal drawdown in supplies. CME cash butter prices are showing a slight recovery, after hitting 2019 lows a few weeks ago.

**Cheese**

Dairy analysts note increased milk production and availability across the country, combined with end users moving to the sidelines after booking nearby needs at elevated levels, have weighed heavily on cheese prices. Analysts also note heavy production schedules are starting to improve nearby supplies of fresh cheese coming to market, also putting pressure on block and barrel prices.

Cheese producers are actively taking in milk across the country, and this should keep prices in the defensive in the near term. Demand was limited this past week, as end users are closely watching the decline in prices, and waiting for them to bottom out before jumping back in with any additional forward purchases. Overall, the increased milk production and availability should keep cheese production rates firm, providing headwinds for cheese prices.

**Shell Eggs**

Retail demand patterns improved throughout the week ahead of the upcoming year-end holidays, while aggressive features are becoming more prominent across the U.S. Analysts expect increased promotional activity in upcoming weeks, as supplies have already started shifting away from abundant levels. Analysts believe this caused prices to consolidate late in the week, as Friday was unchanged from Thursday’s close, with end users testing these lower levels. Laying flocks are still large enough to keep supplies coming to market, but the holiday demand should help keep prices from declining much further.

**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 December 18, 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 reports 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 trending higher, with holiday and retail pressure.

**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, with U-10’s firming. Frozen prices are stabilizing, and are a great value.
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 7-9’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: 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. filets. Analysts expect that this could cause an inventory issue for frozen loins if fisheries don’t start catching larger fish. Larger filets 4-6 oz and 6-8 oz are very tight.
Haddock: Vendors are reporting that pricing is stabilizing.

**MORON**
Inventory levels are good. Vendors report seeing lower pricing on Argentinian 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 very good.

**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 booking 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, both East and West Coast. 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 offerings 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. 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

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<th>PIM Categories Impacted</th>
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<tr>
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<td>Metals - Iron, Steel, Aluminum</td>
<td>Grocery</td>
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<td>Metals - Iron, Steel, Aluminum</td>
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<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>
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<tr>
<td>Metals - Iron, Steel, Aluminum</td>
<td>Canned Goods</td>
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<td>Straws and Stirrers</td>
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<td>Value Added Shelf-Stable</td>
<td>EB Gelatin, Pudding &amp; Pie Filling, Shelf-Stable &amp; EB Sauces, Shelf-Stable</td>
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<td>Plastics</td>
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<td>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 &amp; Film</td>
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<td>Catfish, Flounder, Haddock, Tilapia, Pasteurized Crabmeat, Scallops, Squid, Crawfish</td>
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<td>Canned Fruit</td>
<td>Canned Fruit &amp; Veg.</td>
<td>Mandarins, Nuts, Cauliflower, Other Fruits &amp; Veg.</td>
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