**PRODUCE**

**KEY**
- Anticipating an up market
- Anticipating a steady market
- Anticipating a down market

All produce pricing trends are based on USDA data as of 7/16/2019.

**VEGETABLES**

**POTATOES**

- **Russets**: The market on russets is up this week. Burbanks out of Idaho are up on 70 count, 90 count and 6 oz. minimum size. There is lighter supply, good demand, and varying quality. This is expected to continue until the new crop arrives in mid-August.
- **Reds**: The red potato market out of Eastern Shore, Virginia is down this week, with lighter supply and good demand.
- **Yellows**: The yellow potato market out of Florida is steady, with moderate supply and good demand. Quality is being reported as good.

**CABBAGE**

- **Round Green**: The cabbage market is down this week, with good supply, demand and quality.

**LEAF LETTUCE**

- **Green Leaf**: The green leaf market is down this week, with light to moderate supply and demand. Quality is fair, with irregular sizing and fringe/wind burn.
- **Romaine**: The romaine market is down this week, with moderate supplies and good demand. Quality is fair, due to some fringe and wind burn.

**ICEBERG LETTUCE**

The iceberg market is up this week. It is expected that supplies will be light this week, due to a production gap and quality issues at the field level. Demand and quality are good.

**GARLIC**

Domestic garlic is steady this week, with good supply, demand, and quality being reported. Our suppliers can take on additional business.

**ONIONS**

The jumbo yellow onion market is mixed this week. Product out of San Joaquin Valley, California, and Georgia is up, while product out of New Mexico is down. There is good demand out of all growing regions, with varying quality. Weather has caused some gaps in supply that are expected to continue until the new crop arrives in August.

**MUSHROOMS**

There are no issues to report on mushrooms coming off the East Coast, with good supplies, demand, and quality. There continue to be issues on mushrooms coming from the West Coast regarding supply and quality.

**CILANTRO**

The cilantro market is up this week. Product out of Oxnard, California and Central Coast, California is up on 30’s and on 60’s, with moderate supply and good demand.

**CUCUMBERS**

Cucumber prices are up for the week. Supplies have tightened up in both regions, with good demand. Mexico is transitioning to new fields for the West, while Michigan is starting off slow for the East, due to weather. Quality is fair on the old crop, but good on the newly-harvested crop.

**CELELY**

The celery market is down this week, with good supply, demand and quality.

**YELLOW SQUASH**

Yellow Squash is steady to up in price for the week. Demand has slightly increased, causing a tighter supply. Quality continues to be a struggle, with heavy wind scarring.

**ZUCCHINI**

Zucchini is flat for the week. Supply is meeting current demand. Quality is good for the time being.

**GREEN BEANS**

The green bean market is mixed this week. Machine-picked product out of Eastern Shore, Virginia is up, with moderate supply and good demand. Imported haricot verts are down, with moderate supply and demand.

**BELL PEPPERS**

- **Green**: Green peppers are mixed for the week. The East is seeing a price increase, as supplies tighten up due to transitioning to new fields. The West appears to be flat. Quality is good for now.
- **Red**: Red bell peppers look to be flat for the week. The East continues to pull from hothouses to cover demand, while the West is relying on Mexico for supply. Quality is a mixture of fair to good for the time being.

**TOMATOES**

- **Rounds**: Round tomatoes are steady to down for the week. Small size fruit looks to be steady, while larger sizes look to be seeing a slight price drop. The West is supplied by Mexico and California for now. The East has several regions growing product. Quality is fair, with soft fruit being reported in the fields.
- **Romas**: Roma tomato prices are steady to up for the week. The East supply out of Tennessee looks to be flat, while Mexico is up slightly. Quality is fair to good, with the biggest issue being soft fruit.
- **Cherry**: Cherry tomatoes prices look to be flat for the week. Supply from Florida and Mexico appears to be covering the current demand. Quality is good in both regions.
- **Grape**: Grape tomatoes are up in price for the week. Supplies remain light in both the East and West. Quality is trending between fair and good for the time being.

**CARROTS**

The jumbo carrot market is up this week. Product out of California is up, with moderate supply and good demand. Product out of Mexico is up, with moderate supply and good demand, but quality continues to vary.

**GREEN ONIONS**

The green onion market is mixed this week. Product out of Mexico is down on medium and small, with moderate supply and light demand. Product out of South Carolina is steady, with lighter supply and good demand.

**CAULIFLOWER**

The cauliflower market is up this week, with light supply and good demand and quality.

**ASPARAGUS**

The asparagus market is up this week. Product out of Peru is up, with lighter supply and moderate demand. Quality will vary out of Peru. Product out of Mexico is up also, with lighter supply and good demand.

**BROCCOLI**

The broccoli market is up this week, with light to moderate supply and good demand. Quality is fair to good.
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**PRODUCE**

**HANGING FRUIT**

**APPLES AND Pears**
- **Apples:** All apple varieties out of Washington are steady this week, with moderate supply and demand. Quality is being reported as good. Golden Delicious variety will be unavailable until the new crop arrives in 4-6 weeks. Customers should move to a Gala or Fuji variety.
- **Pears:** The pear market remains stable. Green and red D’Anjou and Bosc are available. The small end of pears remains tight, while 90 count and larger remain constant.

**CITRUS**

**LEMONS**
Lemon prices are flat for the week. Demand on 140 count and smaller is extremely high. Imported product has begun to arrive. Quality out of California is fair at best, but is expected to improve week over week.

**LIMES**
Lime prices are up for the week. Mexico is battling some rainstorms, which have delayed harvests and impacted quality. For now, quality is fair, due to the age of the current crop, along with the rainstorms.

**ORANGES**
Orange prices look to be steady for the time being. Valencia continue to trend toward the 113/88/138 size ranges. Quality continues to be strong. Offshore navels are expected to arrive soon.

**BERRIES**

**STRAWBERRIES**
The strawberry market is down this week. Strawberry demand continues to exceed supply; however, supplies are improving. Quality is expected to continue improving.

**BLACKBERRIES**
Blackberries are looking good and will continue to increase in volume in the weeks ahead.

**RASPBERRIES**
Raspberry supply may start to slowly decline until the next crop kicks off in August, with product beginning to increase after that.

**BLUEBERRIES**
The quality of berries out of British Columbia is good. Oregon blueberries are firm, with good size and very few defects.

**GRAPES**
The grape market is steady this week. Flame Seedless, Red Globe and Sugarones out of Mexico are steady. Flame Seedless, Scarlet Royal and Sugarones out of California are steady. There is good supply and moderate demand.

**TROPICAL**

**PINEAPPLES**
Pineapple prices continue to rise due to tightened supply. Sizing is trending toward 8 count for the time being. Quality continues to be good despite the tight supply.

**BANANAS**
Banana prices look to be flat for another week. Quality continues to be good on all bananas.

**AVOCADOS**
Avocado prices are down for the week. Flora Loca crop in Mexico continues to have a strong harvest. The harvests are grading high, with a limited amount of fruit grading at #2. California harvests continue to wind down, and Peru continues to import product.

**MELONS**

**CANTALOUPES AND HONEYDEWS**
- **Cantaloupes:** The cantaloupe market is flat this week. The growing region has shifted to California. Supplies are expected to be good. It is expected that access to 15’s and 8’s will be greater during this portion of the season.
- **Honeydews:** The honeydew market is down this week. The growing region has shifted to California. Supplies are expected to be good.
All current beef pricing trends are based on USDA data as of July 17, 2019. Last week’s trends refer to the USDA market for the full week of July 8, 2019.

Cash cattle traded slightly up last week, with trades occurring between $112 to $116.50/cwt. This week’s asking price from feeders is listed between $114 to $117/cwt. Bids have started to surface at the $111/cwt. mark.

Harvest came in at 655K head for the week, which was slightly under the analysts’ projection. Of that 655K head, 554K were of the steer/heifer variety. Harvest for the week of July 15, 2019 is expected to be slightly lower, at 663K head.

78.6% of all steers/heifers graded Choice or Prime for the week ending July 5, 2019, which was up from the week prior. Select grading was down at 18.2%, and Ungraded also reported down at 3.2%.

**RIBS**

**RIBEYES:** Heavy and light ribeyes were both down across the board last week, and Ungraded heavies were up a few cents. Choice light ribeyes took the largest declines in the beef market last week. However, that is not the case this week. Through three days of trading, Choice light ribeyes are taking the steepest increases of all beef items, and the Choice heavies are also recovering in price. The Select grade for both light and heavy is showing more discounting.

**CHUCKS**

**CHUCK ROLLS:** Choice rolls were slightly up, and Select product took a loss last week. Through three days of trading this week, chuck rolls are trading flat to slightly down for the Choice and Select grade, respectively.

**TERES MAJOR MUSCLE:** Choice and Ungraded Teres Majors were flat last week. The Select grade took a moderate decline. Currently, Choice Teres Majors are trading flat again, and Select Teres Majors are taking a healthy increase.

**BRISKETS:** Briskets were down across the board on all grades last week. The Choice grade is trading up a few cents through three days this week, while the Select briskets are showing a slight decline. Briskets typically soften during this time of the year.

**THIN MEATS**

**BALL TIPS:** Ball tips showed weakness across all grades last week, led by the Select grade, which was down significantly. In a sharp reversal, both grades of ball tips are showing gains through three days of trading this week.

**FLAP MEAT:** Choice flap meat traded at a small loss last week, while the Select grade traded slightly up. Analysts report a similar pattern is forming through three days of trading this week, although the Select grade’s increase is currently a lot healthier.

**FLANK:** Flank steak was down slightly across all grades last week. Both grades are showing a more modest decline in mid-week trading this week.

**SKIRT STEAK:** The outside skirt market was up slightly last week. Through three days of trading, skirts are trading at a small loss.

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Pork market information is from the week of July 8, 2019.

Last week the USDA estimated hog slaughter was 2.41 MM, an uptick over the previous holiday week and roughly a 6% increase over the same week last year.

The USDA released pork export information for the month of May. Overall, pork exports for May were roughly on par with last year. Year-to-date volume in 2019 is still below 2018 levels.

**LOINS**

Prices in the loin complex were mixed. Bone-in loins have been experiencing some strength. Analysts suspect this is due to retailers booking product out front. They report that boneless loin prices dipped lower, as demand has gravitated to other cuts. Both items historically trade within a narrow, choppy range through August.

**TENDERS**

Pork tenderloin prices continued their flat trajectory, a pattern that dates back to the end of May. Historically, tenderloin prices peak for summer grilling sometime in July or August, and analysts report that any upward risk may become limited as time passes.

**BUTTS**

Pork butt prices continued to ease lower. Supply remains sufficient, due to the larger harvest levels. Pork butt prices move gradually lower from July into early August.

**RIBS**

The rib complex remains active. Backrib prices have been on a steady decline for the past couple of weeks. Historically, this is seen by analysts as a very prescribed move that pushes prices lower through September. Sparerib prices have fallen sharply, but analysts report that prices have dipped to levels that should encourage prices to recalibrate.

**BELLIES/BACON**

The belly market has moved moderately higher. Belly prices remain far lower compared to last year at this time. Year-to-date volume in 2019 is still below 2018 levels.

**HAMS**

After four consecutive weeks of sharp declines, ham prices are higher. Analysts report that prices have dipped to levels that likely have begun to encourage demand. In addition, analysts report that the new trade agreement with Mexico may support ham prices. It is expected that processors will likely step up demand for holiday needs out front as well. Last year, ham prices were up and down from now through October.

**TRIMMINGS**

Trimming prices are higher. Analysts report that it is not uncommon to see a spike in price after a holiday, as major processors get back up to full hours and require a surge in product. However, it is expected that now that the Independence Day holiday has passed, hot dog and grilling promotions will likely ease off until Labor Day. Historically, the trimming markets follow suit in correlation.

**PICNICS**

Prices for both the bone-in and boneless picnics were mixed. Analysts report post-holiday pricing as a bit volatile, but both items traditionally move lower over the next several weeks, due to weaker demand, primarily from processors.
## TURKEY

### BONELESS, SKINLESS TURKEY BREASTS

Boneless, skinless breasts remained unchanged during the week of July 15, 2019. Analysts report that in the near term, market trend expectations should be flat to slightly upward.

### WHOLE FROZEN TURKEYS

The whole turkey market was slightly up during the week of July 15, 2019. Analysts report that near-term expectations should be that this market trends flat to slightly upward during the summer months.

## CHICKEN

Small and jumbo wing markets were flat during the week of July 15, 2019. The medium wing market saw a slight increase, due to continued demand and lack of supply. The small boneless breast market was flat during the week ending July 15, 2019. Analysts report that this should be a short-lived situation, due to the lack of birds in this size category. The jumbo and medium breast markets were down. With the lack of demand and increases in supply, analysts report that this market should continue a gradual downward movement as the seasonal demand for breast ends.

Jumbo tenders were down this week. Analysts show demand in this market from retail and Further Processors has softened; however, they report that this could change rapidly if Further Processors step back into this market. The select/small tender market was flat. Analysts report that this category remains short of supply, and well-supported by the ongoing lack of supply and the YTD headcount deficit in the small bird arena.

Export demand in the dark meat arena continues to be at better than normal levels, trending flat to upward. All markets remained flat this week. Analysts report that export demand continues an upward climb; slight incremental increases should be expected in all dark meat categories near-term. Analysts report that whole birds/WOG demand has balanced out, resulting in a flat to a slightly increased market trend.

### BROILER-TYPE EGGS SET IN THE UNITED STATES UP 1%

Hatcheries in the United States weekly program set 232 million eggs in incubators during the week ending July 13, 2018, up 1% from a year ago. Average hatchability for chicks hatched during the week in the United States was 82.6 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 1%

Broiler growers in the United States weekly program placed 188 million chicks for meat production for the week ending July 13, 2019, up 1% from a year ago. Cumulative placements from the weeks ending January 5, 2019 through July 13, 2019 for the United States were 5.22 billion, up 1% from the same period a year earlier.

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

### WHOLE CHICKEN & CUT-UP PARTS

Small bird supply and demand is still out of balance, pushing pricing higher, as demand is harder to fulfill. Analysts report that this trend should be expected to continue through 2019. The market for larger-size whole birds and WOGs remains steady, bringing with it a balanced market. Analysts report that as jumbo bird availability increases, 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 the week of July 15, 2019. Analysts report that this market continues to be supported by the YTD headcount deficit in the small bird category. Analysts believe that as the season brings changes in demand, the select/small market could trend flat to slightly downward in the near term. The medium boneless breast market was down, with spot load offerings being uncovered at slight discounts. The jumbo boneless breast category was down, with spot product being offered at attractive discounts. They report that looking near-term, this market should continue a flat to gradual downward trend. Analysts report that as bird weights increase, as well as some processors switching from a medium to a jumbo bird, this market could continue a flat to downward movement.

During the week of July 15, 2019, the select/small tenderloin markets were flat. Analysts report that jumbo tenders took a slight decline, and as supply increases, this market could trend slightly lower. They further report that more processors and retailers have stepped away from this category for the near term, which could indicate a flat to continued slightly downward movement.

### WINGS

The small wing market was flat the week of July 15, 2019. Analysts report that expectations are that this market will trend flat to downward for the near term. The medium wing market was slightly up during the week of July 15, 2019, with spot load offers being consistently harder to uncover. Analysts report that the expectation should be that the medium market remains flat to upward in the near term. The jumbo wing market followed the same pattern as the small wing market, remaining unchanged for the week of July 15, 2019. While minimal spot loads have been offered, any attractive discounting has not been shown. Analysts expect the jumbo wing market is expected to trend flat to upward, as the typical seasonal high wing demand is right around the corner.

### BONELESS, SKINLESS THIGHS

The boneless, skinless thigh meat market was flat the week of July 15, 2019. Analysts report that this market should be fully supported by both increased export and domestic demand. They further expect this market to trend flat to slightly upward in the near term.
COMMODITY OIL

SOY, CANOLA & PALM OIL

SOY OIL:

- The August soybean oil contract closed firm the week of July 8, 2019, closing on Friday July 12, 2019 at $.2831 per pound.
- The USDA report that came out on July 11, 2019 was considered by analysts to be price-friendly for soybeans. The 2019/2020 ending stocks estimate was lowered by 250 million bushels on a 1 bushel per acre cut in the yield. Analysts report ending stocks at 795 million bushels remain burdensome. They also report that soybean oil ending stocks were left unchanged at 1.535 billion pounds, as lower production based on reduced crush was offset by a decrease in exports.
- Analysts report that domestic soybean crush margins continue to erode, matching the lowest levels of 2019.
- They also report that firming crude oil prices lent support to the soybean oil futures the week of July 8, 2019. That market has moved back above the $60 per barrel level. Analysts report that Tropical Storm Barry, a larger than expected weekly drawdown in stocks, and ongoing tensions with Iran may have contributed to the strength in the crude oil market.

CANOLA

- Analysts report that stocks continue to build without an export market to China; weather has improved, but canola oil basis levels still are considered weak.

PALM OIL

- The Malaysian Palm Oil Board reported end-of-June palm oil stocks at 2.424 million metric tons. The number was down slightly from May, but remains well above levels posted last year at this time.

DAIRY

All dairy pricing trends are based on USDA and CME data as of July 16, 2019.

BUTTER

Butter production is mixed. Analysts report that this may be driven primarily by the strong cream demand from other seasonal producers continuing to pull butterfat, affecting the amount available for spot butter makers. Demand is steady in all regions. CME butter markets are up a few pennies this week, and are at their highest point in 2019 so far.

CHEESE

Cheese production is reported as active across the U.S., with nearby milk supplies still readily available for cheese manufacturers. Analysts report that even with the higher costs for milk loads and strong demand, the higher cash prices continue to incentivize active production schedules. Further, analysts report that cheese is still clearing into cold storage, as producers try to front-run some of the seasonal slowdowns in output. CME markets are showing some price relief after hitting 3-year highs over the past few weeks.

SHELL EGGS

Analysts report that demand remains on the decline, as retailers have dramatically reduced their promotional activity and orders accordingly. They believe that this has cast the market back into an oversupplied mentality, with buyers waiting for prices to stabilize before restocking. Inventories remain at comfortable levels, as there are still more than enough birds in the laying flock. In addition, analysts report that lower prices have prompted producers to run into increased feed cost, further limiting their profitability. They expect that this should take some additional birds out of the pipeline and eventually support this market.

MILK & CREAM

Milk production across the U.S. has entered a seasonal slowdown, with smaller herds and warming temperatures reducing output estimates. Demand has slowed compared to Q2, coinciding with school summer break.
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SHRIMP, DOMESTIC
(Whites and Browns): The current catch is producing larger shrimp in the 16/20, 21/25 and 26/30 range. This goes along with the reports that all the fresh water coming out of the Mississippi River has pushed the smaller shrimp further out into the Gulf of Mexico. Smaller shrimp will have a lot of pressure on availability and price. The brown season is now open.

(Domestic PUDs): Smaller PUD’s are becoming tight, as they have been pushed further out into the Gulf of Mexico with the influx of fresh water coming out of the Mississippi River, which traditionally puts pressure on this category. Urner Barry is reporting higher pricing across the category.

SHRIMP, IMPORTED
(Black Tigers and Whites): The seafood industry is seeing pressure on inventory and higher pricing on both white shrimp and black tigers. Large size whites, 26-30 count and larger, are under a ton of pressure due to seasonal demand and lower inventory domestically.

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

CATFISH
Domestic: The warm weather is allowing more feeding of fish, with production continuing to improve. Analysts report that pricing is expected to soften.

Imported: Analysts report that with pricing firming up, the 5-7 oz. size range is in very tight supply. Pangasius or domestic catfish would be good alternatives.

SALMON
Atlantic Farmed Salmon: Analysts report that the fresh market has mostly stabilized, with some spot opportunity. Frozen portions have remained steady, but analysts expect that they will be moving up as we enter Q3. Reports indicate that there is still a concern that 4 oz. portions will get tight, as the size of fish needed to produce that size is in short supply.

Mahi-Mahi
Pricing has turned steady with fewer offerings. Inventory is in good shape along all size portions.

Scallops
Sea: Pricing has turned steady. The catch is going well for the new season.
Bay: Pricing is moving upward as analysts see product from China entering the U.S. after tariff increases.

Tilapia
Demand has been steady; however, analysts believe the market will now see higher costs in Q3 due to additional tariffs.

Pangasius
Pricing is trending downward, as inventory levels in the U.S. are in very good shape.

Ripefish Complex
Cod: Atlantic cod pricing is being finalized for Q3, and our vendors are expecting increases. It is expected that Pacific cod will be mostly stable to start, but could firm moving forward.

Pollock: The fishery for Pacific pollock has produced only smaller 2-4 oz. fillets. It is expected that this could cause an inventory issue for frozen loins if they don’t start catching larger fish. Larger fillets 4-6 and 6-8 oz. are very tight.

Haddock: Vendors are reporting that pricing will be moving up for Q3 behind additional tariffs, high demand, and tight supply.

Flounder: Inventory levels are in good shape. Vendors are reporting that pricing will be firming on goods coming from China, due to the additional tariffs. Analysts report that fish from Argentina should start to firm up with the seasonal change.

Tuna, Yellowfin
(Frozen Steaks & Loins): Tuna pricing and inventory is stable.

Swordfish
Swordfish pricing is very stable. Inventory levels are in very good shape.

King Crab
(RED & GOLDEN): Product is very short in the marketplace, and is expected to be tight ongoing. Some spot opportunity exists.

Crabmeat
(Blue & Red, Pasteurized): The market is showing an imbalance in movement and pricing. Inventory seems to be in good shape overall. As the summer demand continues to kick in over the coming weeks, analysts believe this should stabilize the market.

Mexico Blue Crab season is beginning to slow, as is common this time of year. Pricing is stable and supply is fair.

Snow Crab
Alaskan: Most vendors are off the market, with very little if any product out there currently.

Canadian: The Canadian fisheries are starting to end. As pricing is now stabilizing at higher levels, analysts believe it could move higher through Q3.

Lobster
North American Lobster: Pricing is steady to firm. Small size tails and meat seem to be in decent shape. Large size tails continue to be a challenge. Maine is expected to be underway toward the end of July.

Lobster Tails Warm Water: The industry is extremely tight, with no new production set until the season starts in August. Very little product will be available.

Lobster Meat: Pricing and demand are steady.
US TRADE DISPUTE WITH CHINA UPDATE

- The U.S. announced in 2018 they would impose tariffs on imports to shrink the trade deficit.
- 4 rounds of tariffs have been implemented so far:
  1. March 23, 2018, ~$3 billion of products: imported Steel (25%) and Aluminum (10%).
  2. The next round of ~$50 billion in products from China - mostly machinery and parts - was put on in 2 stages:
      July 6, 2018, ~$34 billion of imported products (25%).
      August 23, 2018, ~$16 billion (also 25%).
  3. September 24, 2018, an additional ~$200 billion in products from China (10%).

4. May 10, 2019, the U.S. government raised the 10% tariff it had implemented on $200 billion of Chinese goods to 25%.

5. China has initially matched the first $50 billion, and then an additional $60 billion against the latest round ($200 billion).

6. China announced on May 20, 2019, that it would raise tariffs to 20% or 25%, up from the 10% already in place.

### Products with Price Increases

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<td>Catfish, Fleounder, Haddock, Tilapia, Pasteurized Crabmeat, Scallops, Squid, Crawfish</td>
</tr>
<tr>
<td>Canned Fruit</td>
<td>Canned Fruit &amp; Veg.</td>
<td>Mandarins, Nuts, Cauliflower, Other Fruits &amp; Veg.</td>
</tr>
</tbody>
</table>

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