



MARKET TRENDS

FOR WEEK ENDING OCTOBER 27, 2017



MARKET TRENDS

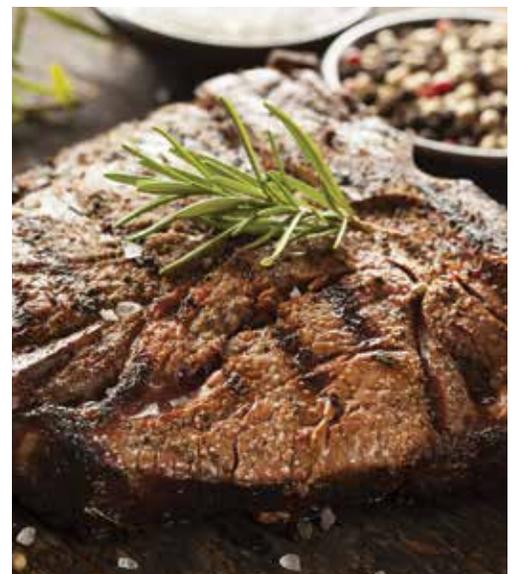
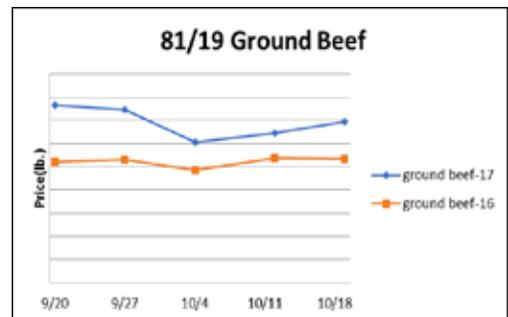
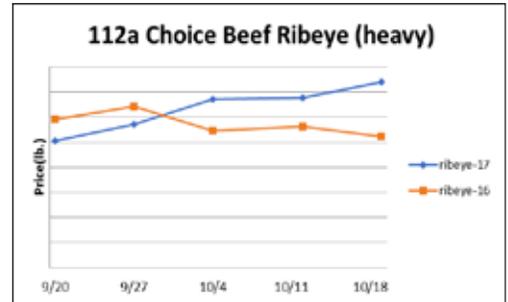
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Beef, Veal & Lamb

Beef production last week fell 1.6% but was 1.6% larger than the same week last year. Fairly ample near slaughter ready cattle supplies are anticipated to persist over the next few months, fueling strong beef production. The USDA is forecasting Q4 2017 beef output to be 7.4% larger than the previous year. Beef demand has been lackluster as of late with the four-week totals of spot sales (16.7%) and forward sales (5.7%) down from 2016. However, low retail prices could eventually encourage beef movement and support the wholesale beef markets. Retail top sirloin prices during September were the least expensive for the month since 2013.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Decreasing	Short	Higher
Ground Beef 81/19	Increasing	Good	Higher
Ground Chuck	Increasing	Good	Higher
109 Export Rib (ch)	Increasing	Good	Higher
109 Export Rib (pr)	Decreasing	Good	Higher
112a Ribeye (ch)	Increasing	Good	Higher
112a Ribeye (pr)	Decreasing	Good	Higher
114a Chuck , Shlder Cld(ch)	Decreasing	Good	Higher
116 Chuck (sel)	Decreasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Higher
116b Chuck Tender (ch)	Decreasing	Good	Higher
120 Brisket (ch)	Increasing	Good	Higher
120a Brisket (ch)	Decreasing	Good	Higher
121c Outside Skirt (ch/sel)	Increasing	Good	Higher
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Decreasing	Good	Higher
167a Knuckle, Trimmed (ch)	Increasing	Good	Higher
168 Inside Round (ch)	Decreasing	Good	Higher
169 Top Round (ch)	Increasing	Good	Higher
171b Outside Round (ch)	Decreasing	Good	Lower
174 Short Loin (ch 0x1)	Decreasing	Good	Higher
174 Short Loin (pr 2x3)	Decreasing	Good	Lower
180 0x1 Strip (ch)	Increasing	Good	Higher
180 0x1 Strip (pr)	Increasing	Good	Lower
184 Top Butt, boneless (ch)	Decreasing	Good	Lower
184 Top Butt, boneless (pr)	Steady	Good	Lower
184-3 Top Butt, bnls (ch)	Increasing	Good	Lower
185a Sirloin Flap (ch)	Increasing	Good	Higher
185c Loin, Tri-Tip (ch)	Increasing	Good	Higher
189a Tender (sel, 5 lb & up)	Increasing	Good	Higher
189a Tender (ch, 5 lb & up)	Increasing	Good	Higher
189a Tender (pr, heavy)	Decreasing	Good	Higher
193 Flank Steak (ch)	Decreasing	Good	Lower
50% Trimmings	Steady	Good	Higher
65% Trimmings	Increasing	Good	Higher
75% Trimmings	Steady	Good	Higher
85% Trimmings	Decreasing	Short	Higher
90% Trimmings	Decreasing	Short	Higher
90% Imported Beef (frz)	Increasing	Good	Higher
95% Imported Beef (frz)	Increasing	Good	Higher
Veal Rack (Hotel 7 rib)	Steady	Good	Lower
Veal Top Round (cap off)	Steady	Good	Lower



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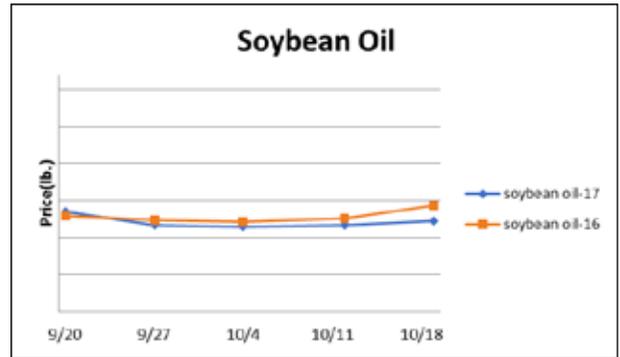
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Grains

The domestic corn and soybean harvests are progressing but remain well behind historical averages. However, part of this is due to better than expected yields in parts of the U.S., and crop ratings continue to improve. Further, the harvest is expected to expand in the coming weeks. Ample feed supplies are likely into 2018.

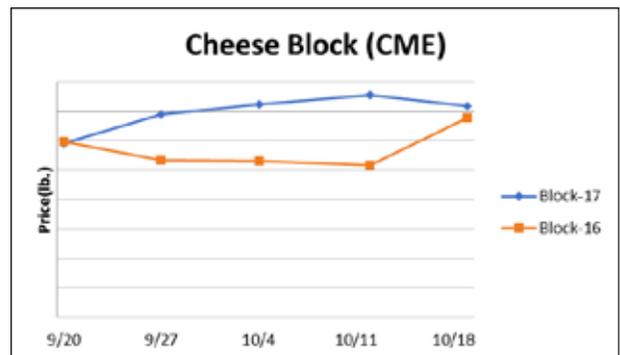
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Higher
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Higher
Corn, bushel	Increasing	Good	Lower
Crude Corn Oil, lb	Steady	Good	Same
High Fructose Corn Syrup	Steady	Good	Lower
Distillers Grain, Dry	Increasing	Good	Higher
Crude Palm Oil, lb BMD	Increasing	Good	Higher
HRW Wheat, bushel	Increasing	Good	Higher
DNS Wheat 14%, bushel	Decreasing	Good	Higher
Durum Wheat, bushel	Increasing	Short	Higher
Pinto Beans, lb	Decreasing	Good	Lower
Black Beans, lb	Decreasing	Good	Lower
Rice, Long Grain, lb	Steady	Good	Higher



Dairy

The CME butter market has firmed during the last week as buyers secure inventory for the pending holiday season. Butter export demand has been solid as well. During August, the U.S. exported 189% more butter than the previous year. And despite world butter prices starting to turn downward, CME prices remain attractive for exports which could limit the downside in butter prices in the near term. CME cheese prices have remained fairly resilient as of late. However, record nonfat dry milk stocks are expected to help fuel solid cheese production and supplies into 2018.

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



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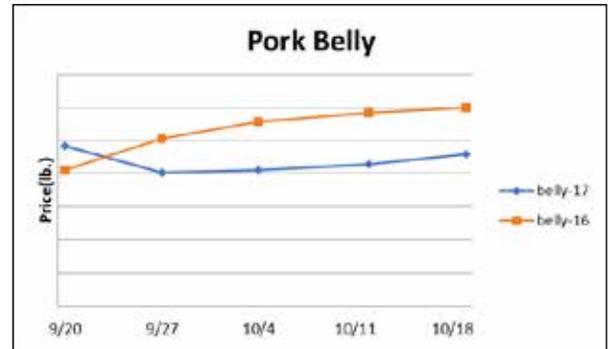
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Pork

Pork output last week declined 1.4% but was 9.3% larger than the same week last year when production was shortened due to Hurricane Matthew. Hog supplies remain ample, but growing slaughter capacity is creating more competition for the hogs which has been supportive of prices. However, strong output is expected to temper the upside in the pork markets this fall. Retail bacon prices in September rose 2% from the prior month, were up 16.1% from last year, and a record for any month. Wholesale belly prices may still move down.

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



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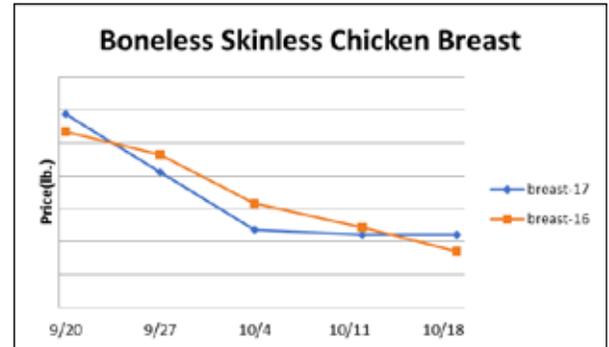
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Poultry

For the week ending October 7th, chicken production declined 1.6% and was 1.8% less than the same week last year. However, part of the year-over-year decline was abnormally heavy chicken weights for the respective week in 2016. The six-week total of chicken output stands at 2.5% versus 2016. The USDA is forecasting solid year-over-year chicken output during the fall to be up 2.8%. This could temper the upside in the chicken wing markets. However, the USDA is anticipating much smaller gains in annual chicken output this winter which would be supportive of wing prices. Disappointing chicken exports are weighing on leg quarter prices. During August, U.S. chicken exports were the second lowest for the month since 2010.

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



Description	Market Trend	Supplies	Price vs. Last Year
Whole Turkey (8-16 lb)	Steady	Good	Lower
Turkey Breast, Bnls/Sknl	Increasing	Good	Lower



Eggs

Description	Market Trend	Supplies	Price vs. Last Year
Large Eggs (dozen)	Decreasing	Short	Higher
Medium Eggs (dozen)	Decreasing	Short	Higher
Liquid Whole Eggs	Decreasing	Short	Higher
Liquid Egg Whites	Steady	Short	Higher
Liquid Egg Yolks	Increasing	Short	Higher
Egg Breaker Stock Central	Decreasing	Short	Higher

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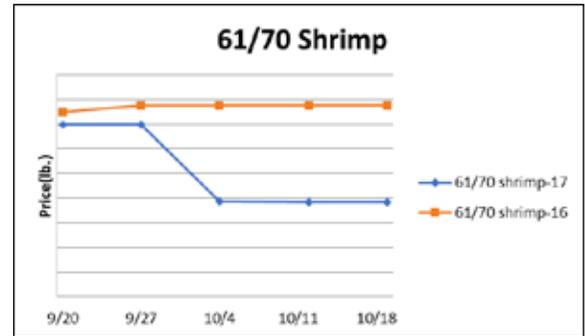
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Seafood

The Alaskan snow crab season is underway with the quota cut once again. For 2017-18, the Bering Sea snow crab quota is 18.961 million pounds, which is 12.1% less than last year and the smallest in at least the last decade. The Bering Sea's snow crab quota just six years ago was 79.9 million pounds. Snow crab prices may remain expensive into 2018.

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



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Paper and Plastic Products

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

Retail Price Change from Prior Month

Description	Aug '17	Jul '17	Jun '17
Beef and Veal	Decreasing	Increasing	Increasing
Dairy	Increasing	Increasing	Decreasing
Pork	Increasing	Increasing	Increasing
Chicken	Increasing	Increasing	Increasing
Fresh Fish and Seafood	Increasing	Decreasing	Increasing
Fresh Fruits and Vegetables	Increasing	Increasing	Decreasing

Various Markets

Arabica coffee futures have softened this month. Better weather for the developing Brazilian coffee crop is seen as conducive for strong crop yields next spring. Further, a weak Brazilian real is weighing heavy on coffee prices and may limit the upside this fall.

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



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Produce

The Hass 48 count avocado market has fallen sharply this month after making record highs. Supplies from Mexico are besting demand which is weighing on prices. Imports from Mexico last week rose 6.3% from the previous week and were nearly threefold bigger than the same week last year. Avocado imports from Mexico accounted for 87% of the total supply in the U.S. History suggests there may be even more downside to the avocado markets in the coming weeks. The harvest transition has caused a sizeable supply gap for lettuce supplies which may continue in the near term. Oranges and iceberg lettuce continue to be in a very extreme market. There is heat damage in almost all leaf and tender leaf products, including broccoli florets. Strawberries and asparagus have improved.

Eastern and Western Vegetables

HURRICANE IRMA UPDATE: We will see a very active market and potential supply interruptions on all east coast vegetable items due to the aftermath of Hurricane Irma. Several of our partner growers have sustained severe damage to infrastructure, as well as crops. Fortunately, the forecast calls for favorable weather in the region over the next several days, which will assist in the recovery process. We expect to see very active markets over the next two to three months due to the damage of the fall crops in North Florida and South Georgia. We are anticipating a bold recovery in the Immokalee and Naples area in the next 4 to 6 weeks barring no additional severe weather events.

Tomatoes - East

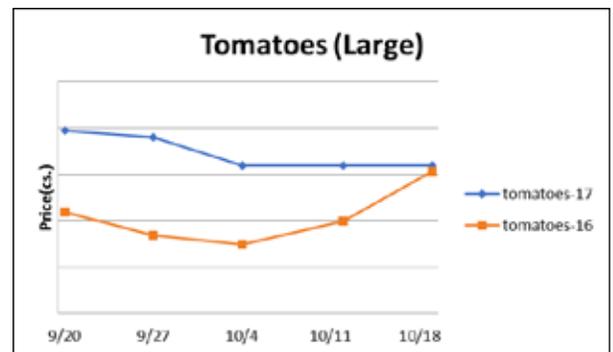
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Tomatoes - West And Mexico

WEST COAST WEATHER STATEMENT: Last week California experienced severe weather including rain, high humidity and wind. Combine these events with several heat waves over the past several weeks, and it does not impact crops in a positive manner. We are seeing heavy bloom drop and damage to fruit maturing on the plants. We expect an early completion of the tomato and squash season in the west adding additional concerns for shortages of supply over the next few months as Florida begins to recover from Irma.

MARKET ALERT

- **Avocados – ESCALATED**
- **Broccoli /Broccoli Florets – ESCALATED**
- **Carrots – EXTREME**
- **Cilantro – ESCALATED**
- **Garlic – EXTREME**
- **Green Beans – ESCALATED**
- **Lettuce (Iceberg) – ESCALATED/ EXTREME**
- **Lettuce (Romaine, Romaine Hearts) – ESCALATED**
- **Melons (Honeydew & Cantaloupe) – ESCALATED**
- **Mushrooms – ESCALATED**
- **Oranges – EXTREME**
- **Onions – ESCALATED**
- **Spinach – ESCALATED**
- **Cherry Tomatoes – ESCALATED**



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Produce

Apples & Pears

Prices are unchanged. The California Fuji and Granny Smith seasons will end next week. The storage crop season for Washington Red Delicious Apples will finish this week. New crop Washington Fuji, Gala, Golden Delicious, Granny Smith, and Red Delicious stocks are on the market. Sugar levels range from 14 to 18 Brix. Pear prices are stable. The California Bartlett season will continue another week or two. New crop Washington Bartlett and D'Anjou Pears are on the market. Sugar levels range from 12 to 14 Brix.

Artichokes

Steady market with higher prices. Quality is good.

Arugula

Supplies are low for baby and wild. Quality is fair. Prices are rising.

Asparagus

Good supply, prices are back to normal and quality is good.

Avocados – ESCALATED

We are seeing an abrupt turn down on volume crossing the border over the next 10 days due to volume cutbacks. We expect to see volume down by nearly 7 million pounds today and possibly capping out at 15 million pounds by the time we hit the bottom. Quality is very good. FOB prices will tick back up; however, there should be no supply issues this week.

Bananas

Demand and quality are good and inventories are unchanged this week.

Beans

East: As cooler weather rolls in, eastern VA is winding down quickly. GA is seeing poor quality, resulting in a shortage of supply and quality. FOBs are up significantly. Supplies will be touch and go for the next 3 weeks until Plant City, FL begins.

West: Wastonville has minimal supplies coming in and the desert is off to a very rocky start. It could be as far out as the first week of November before any relief is in sight. Quality is fair to good.

Berries:

Blackberries

The market is high; stocks are scarce. The Salinas/ Watsonville season has ended. Mexican volume is starting to increase, but remains low this week. Quality is good: softness is a problem due to sporadic heat. Sugar levels range from 12 to 13 Brix.

Blueberries

Prices are rising. Growers have started shipping from countries in South America. Supplies will increase through this month. Quality is improving: berries are plump, juicy, and sweet.

Raspberries

Prices remain weak; California stocks are ample. Mexican supplies have increased to adequate levels. Quality is average: color is deep red, texture is tender, and flavor is tangy, yet sweet. Sugar levels range from 13 to 14 Brix.

Strawberries

The market is low. New crop supplies are ample in Santa Maria, California. Quality is good, but size is small due to a recent heat wave. Long-stem strawberries are extremely limited.

Bok Choy

Quality is good and we are seeing some higher quotes on WGA cartons.

Broccoli / Broccoli Florets

ESCALATED - Supplies are still very short. Quality has some heat damage. Prices are high but seem to be tapering off.

Brussels Sprouts

Very high prices and tighter supplies remain but are leveling out. Quality is improving.



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Produce (continued)

Cantaloupe

Market very strong, we are finished on the Westside for the season and have started in the desert and supplies are getting better each day out of there. The overall quality is very nice, fruit is firm and clean with a nice clean net, and overall just a very nice opening box. We have had some cooler temperatures which has helped to firm up the fruit and fruit is eating excellent we are peaking on 9's and 12's but getting a few smaller. We will have good volume going forward here through November out of the desert region.

Carrots

EXTREME - Due to the heat and rain, we are seeing some quality issues and a shortage on jumbo supplies as well as tables and cellos.

Cauliflower

Market has improved, volume this week has been average and we have seen a decrease in price. Quality is good.

Celery

We are starting to see prices rise. Supplies are lower than normal.

Cilantro

ESCALATED Quality is poor; there is still yellowing with some decay. Prices are higher but getting better.

Corn

Volumes are declining in all markets; however, demand is flat. The market is mostly unchanged, and quality is still good on yellow, white and bicolor.

Cucumbers

East: Most local deals have wrapped up with a few still trickling in over the next 7 days. GA is proving to have good supply, however, there is a wide price variance for the levels of quality available.

West: Mainland MX & Baja both continue with strong supplies. Baja is expecting to run through November tapping new fields in the upcoming weeks. FOBs are low and will remain this way through the next few weeks. Quality from both areas overall is good.

English Cucumber

Supplies are mostly unchanged. We should see some improvement as greenhouse production in Mexico is anticipated to ramp up over the next 10 to 14 days. Markets remain mostly unchanged.

Eggplant

East: Still holding on to local deals, FOBs remain low as good supply comes from most regions including NC, SC & GA. Quality overall is good, however, some reports of disease in GA are showing some brown calyx.

West: CA supplies remain a little on the light side this week as we wait for the desert to begin over the next 7-10 days. FOBs are fairly flat week over week. Look for Nogales to begin in mid-November for relief. Quality is good at this time.

Fennel

Supplies for the week will be good and quality is good.

Garlic

EXTREME We just finished our 2017 harvest this week. We have fortunately harvested our most normal crop since 2014. Our yields were pretty much as expected, nothing extraordinary, but a good crop of garlic. Presently, demand for domestic garlic still exceeds supply.

Ginger

Chinese ginger supplies have tightened up putting upward pressure on prices across the country. This is still a better dollar value than ginger from Hawaii, Brazil, Thailand and Costa Rica.



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Produce *(continued)*

Grapes

We are still harvesting here in the central San Joaquin Valley and we will be harvesting grapes here through November barring any major weather issues. The overall crop looks very good with a nice set and some very nice quality. We are seeing some burn due to the extreme heat we have been experiencing in some vineyards but at this point it looks to be minimal damage. We did also get some sporadic rain last week, we have assessed the damage and there is some fruit in the southern region near Bakersfield that did get up to 2 inches of rain and there are some vineyards that are not going to get harvested due to the damage. Overall it looks like it was just isolated areas that were hurt. We are harvesting a few different varieties (Sugarone, Ivory, Princess, Green Globe, Autumn King) of green grapes now and all look excellent with good sugar and very clean and green, the reds we are harvesting are (Scarlett Royals, Crimson, Timco, Allisons and Magentas).

Green Cabbage

Supply is good on both coasts, quality is good.

Red Cabbage

Quality and sizing have been great with good color. Market is stable.

Green Onions

Iced - Prices are average, quality is poor with heat related damage.

Iceless - This market is steady and we are seeing heat related quality issues.

Honeydew

Market is strong and we have finished here on the Westside as demand is excellent, we have started in a light way in the desert and should have better volume by next week, demand has been exceeding supply. The overall quality is fair to good with excellent sugars and a nice clean green to cream cast, with internal color nice and nice tight cavity. We will have fruit out of the desert through November as well.

Jicama

Normal prices and quality is good.

Kale (Green)

Demand is steady and quality is just fair. Supplies are starting to lighten up with product being affected by heat damage.

Kiwi

Shipments are for the most part finished out of Chile. What is in storage will be it for the season. Still looking for California to begin harvesting over the next several weeks. Markets remain very active with limited availability on the horizon. Quality is still very nice.

Lemons

We have finished our Mexico fruit and are done on Chilean and are going with good numbers out of Dist. 3 (Desert) fruit is midsized peaking on 140's, 165's followed by 115's. The overall quality is good and also gassing this fruit 3-5 days which will cause some spotting and some checkerboard color in the box. We have a lighter than normal crop in dist. 3 about 15%-but we are getting a little later start than normal so supplies will be good. We are planning on starting our dist. 1 fruit around mid to late November as well and that will carry us through May.

California Lettuce:

Butter

Prices are stable. Quality is average due to the heat.

Green and Red Leaf

Quality is average, we are seeing fringe burn. Demand is steady. Supply is below normal.

Iceberg Lettuce

ESCALATED/EXTREME - Supplies are very light this week. Quality is starting to show signs of heat issues. We are seeing lighter weights and yields in the fields. We expect some relief in this market in the next weeks, but it will remain steady until we move into Yuma.

Romaine

ESCALATED - Average supply. Quality is overall fair but improving. We are still seeing fringe burn and yellowing on the outer leaves and other heat-related issues. Prices are better.

Romaine Hearts

ESCALATED Supplies are average but prices are better than last week. Quality is average to poor; however, growers are able to control some of the quality issues by peeling off some of the outer layers.



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Produce (continued)

Limes

Rain has reduced Mexican stocks; the market is up. Quality is good: stylar is a minor issue.

Mushrooms

ESCALATED - Mushroom growers have suffered damage in the South and Southeast, as well as Puerto Rico. Hurricane Harvey and Irma have resulted in a tightening market, and the American Mushroom Institute said it expects supply to be affected for several months.

Napa

Supplies are normal. Quality is good.

Idaho/Oregon Onions

As of today it looks like we are about 85% done with the onion harvest. According to the Weather Service we are expecting rain starting this coming Friday which will last throughout the weekend. We are in hyper-harvest right now as we must get the remaining crop in prior the rain on Friday otherwise that product may get left in the field. Markets are pretty steady right now, there's some minor market activity on some red onions but price should hold for the next week.

Oranges

We are starting navels in a light way today and should be getting into some better volume in the next 7-10 days and by the first of November should be in full swing. This year's crop as we have mentioned in the past is about 20% lighter than last year, therefore we will see larger size fruit through the year. The first of this fruit is peaking on 88's followed by 113's and then 72's on the early Fukumoto's, which typically we are peaking on 113's and 138's. The fruit has at least 120 hours of gas on the fruit so you will see green spotting and checkerboard color through the box. The fruity is actually testing 11-12 brix which is very good for this time of the year. Our Temperatures will be cooling down to the low 70's high and 40's at night, with that fluctuation in temperature that will really help the color, but we will be gassing fruit for at least another 4- 5 weeks to color up the fruit fully.



Parsley (Curly, Italian)

We are seeing prices that are still higher, the warm temperatures have caused quality issues.

Green Bell Pepper

East: Volume remains substantial from many regions including KY, NC, SC, VA, TN & GA. FOBs are steady. Quality from both older and newer fields is looking good.

West: With cooler temps settling in, volume has slowed down which is driving prices slightly up. A few quality issues have been reported from Coastal CA. The desert is expected to start later this week which should bring more volume to the table.

Jalapeño Pepper

East: Mostly coming from the GA area now, there is good steady supply. Prices are a little up, however, not by much. Quality from GA is proving to be good.

West: There is upward pressure on prices as Santa Maria wraps up their season. They are also seeing a decline in quality. Baja has some light supplies, but not enough to fill the void. Their quality is much better than Santa Maria. Look for relief in about 10-14 days from Sonora as they begin earlier than expected due to good weather conditions. Sinaloa will start shortly after that.

Red & Yellow Pepper:

Red Bell Pepper

Red Pepper supplies are mostly unchanged from last week. Expect good quality through the rest of the month due to more favorable weather impacting Central California in the extended forecast. FOB quotes are mostly unchanged this week.

Yellow Pepper

Supplies have been manageable and expect good quality over the next week. FOB prices are mostly unchanged.

Pineapple

The market is weak; supplies are abundant, especially large sizes. Quality is very good: fruit is juicy and tangy, yet sweet. Sugar levels vary from 13 to 16 Brix.

Idaho Potatoes

Idaho is still dealing with cold weather issues that is slowing down harvest. The nighttime temperatures have improved slightly but we still have to wait each morning for the ground to warm up enough to continue harvest. Shippers are currently packing more of larger cartons: 70ct, 60ct along with 50's and 40's. Smaller size russets are short in supply right now and that would include both varieties. With that it looks like the overall market is gaining a little strength right now with most the movement coming on the 80ct and smaller.

MARKET TRENDS

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 **PERFORMANCE**
FOODSERVICE



Produce (continued)

Radishes

Quality is good and supply is slowing down. Expect to see stronger markets through the summer.

Salad Blends

Prices are up. Expect tight raw product iceberg and romaine stocks through the harvesting transition from Salinas to Yuma, Arizona in November. Quality is average: core material/ seeder and internal burn are occasional problems. Shelf-life is being monitored closely by Inspectors for best quality.

Snow and Sugar Snap Peas

Snow and sugar snap peas are in high demand with good quality.

Spinach (Bunched)

ESCALATED - Supply is average and quality is poor due to heat-related issues. Prices are high.

Spinach (Baby):

ESCALATED - Baby and clipped spinach supplies are low. Quality is poor due to heat-related issues and occasional reports of mildew. Prices are somewhat up.

Spring Mix

Supplies are average with fair quality.

Yellow Squash / Zucchini

East: There is still good supply coming from most areas, however, yellow has been slightly tighter. This is mostly due to lighter plantings. Some quality issues on yellow in the form of scarring has been reported. Zucchini supplies and quality overall are good. Pricing is steady.

West: A few CA shippers still have supply in Watsonville and Fresno, however, Nogales is the major player here with great supplies crossing. Prices are expected to remain low through the season barring any weather events. Quality is good from all areas.

Tomatoes

East

Rounds

Most VA crops have completed for the season, however a few fields in the Carolinas, AL & TN will have light volume trickle in until first frost. Although volume continues to be light, demand is extremely light, resulting in a slightly lower FOB market for next week. Quality from these areas varies crop to crop, but overall is fair to good. Early Quincy & Palmetto/Ruskin crops are still anticipating a lower crop yield due to Irma. First outlook is quality from these areas is various.

Romas

TN, VA, AL & the Carolinas are all finishing up their fall seasons. Little will be coming from the east until first frost. Because of the lighter demand, prices are only slightly on the rise. Quality from the last of the fall crop is fair to good. Quincy & Palmetto/Ruskin have slowly started, but yields are expected to be reduced greatly. First outlook is quality from these areas is various.

Grapes

Supplies are dwindling down as most eastern growers finish their fall season. Demand is fairly steady but strengthening, thus driving market prices up quite a few dollars. New production areas are very slow to start and quality reports are coming in as average.

Cherries

A small bump in demand with grapes being so limited is driving the cherry market ever so slightly up. Quality is mostly good.

West/Mexico

Rounds

Week demand combined with spotty quality is resulting in a wide spread in FOBs. There is some downward pressure, however, quality with the lower FOBs seems to be more questionable and resulting a higher shrink. Volume continues to decline as various shippers wrap up, but some are expecting to finish out October with light supply. MX vine ripe production continues to increase as steady supplies cross.

Romas

As some CA growers start to taper off, others are anticipating their crop to go through the end of October. Although demand is weak, we're seeing an increase on large while medium and XL prices remain fairly flat. Baja & Eastern MX continue to see good supplies as they tap into new plantings. Quality is looking average to good.

Grapes

Baja and eastern MX continue to see only light supplies. FOBs for good quality fruit are moving upwards again just a few dollars.

Cherries

Continuous light supplies from the region is keeping the cherry market higher than usual. Quality is mostly good.

MARKET TRENDS

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 **PERFORMANCE**
FOODSERVICE



Produce

Tree Fruit

The market is elevated. The California black plum, peach, and nectarine seasons have ended. Red plums will remain available another week or two. Expect a gap before the offshore season starts. Quality is good: sugar levels vary from 14 to 16 Brix.

Watermelons

Prices are steady; stocks are becoming more plentiful, especially from Mexico. Quality ranges from good to very good: sugar levels are approximately 11 Brix.